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2013

**SAN FRANCISCO
COMMERCE & INDUSTRY
INVENTORY**

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About the 2013 Commerce & Industry Inventory

This is the twentieth Commerce & Industry Inventory prepared by the San Francisco Planning Department. It presents findings and data on economic activities in San Francisco from 2004 through 2013, including population, labor force, employment, establishments, wages, retail sales, monetary transactions, building activity, land use, and transportation.

The short-term goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies.

The long-term goal is to establish a consistent time series of economic land use-related data and compile background information for the periodic update of the Commerce and Industry Element of the San Francisco General Plan.

The 2013 Commerce & Industry Inventory is organized as follows:

1. About the 2013 Commerce & Industry Inventory
2. Infographic Highlights
3. Findings: San Francisco Economy in 2013
4. Appendix: Data 2013

The first three sections summarize key points. The Appendix contains the updated text and data continued from previous Commerce and Industry Inventories.

FORMAT OF THE 2013 COMMERCE & INDUSTRY INVENTORY

The Infographic Highlights presents key findings in simple, bold graphics, and is available as a stand-alone document. Findings: The San Francisco Economy in 2013 summarizes the main points of the updated Commerce & Industry Inventory. The Appendix contains the full data tables and also describes key methodology.

A spreadsheet of the C&I data is also available electronically on the Planning Department's website, along with the document and links to the data on DataSF (<https://data.sfgov.org>).

The Planning Department welcomes your thoughts and suggestions on updating the *Commerce & Industry Inventory*. You can send them to paolo.ikezoe@sfgov.org

THE DATA APPENDIX

The Data Appendix contains seven chapters:

- **1.0 Introduction** explains data formats, economic indicators, variables, industrial classification system.
- **2.0 Regional Overview** presents the San Francisco Bay Area's economy in historical and geographical context for four subregions.
- **3.0 Employment** presents data for Industry Group, Land Use Category, and Commerce and Industry (C&I) District.
- **4.0 Establishments** presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size.
- **5.0 Monetary Transaction** includes data on wages, taxable retail sales and sales permits, city government revenues and expenditures.
- **6.0 Building and Land Use** presents the number of building permit applications and total construction cost estimated for all permit applications, including those for new construction and demolitions/alterations. Permit application status is reported for the current year only. The square footage of the land use footprint is presented by planning area.
- **7.0 Transportation** includes commuter transportation mode, net added parking spaces, private vehicle occupancy rate, transit ridership, and Transit Impact Development Fee (TIDF) revenues.

The rest of this "About" section summarizes information regarding data and method that is useful for understanding the Infographic and the Findings sections. Appendix Chapter 1.0, Introduction, describes data and method in detail.

Data Formats

This Inventory presents economic data in terms of time, type of activity, and geographic distribution. Economic indicators use various metrics, such as employees, establishments, and dollars. This Inventory groups data in three ways: (1) Land Use Category, (2) Commerce and Industry Districts, and (3) Industry Group.

The following section describes these groups as background for reading the **Infographic Highlights**, and the **Findings**. Readers will find a more detailed discussion of the data and tables in **Appendix Chapter 1, Introduction**. By using three specific data formats or groupings of the data, the Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators.

Commerce & Industry (C&I) Districts

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. *Map 1.1* in the Appendix shows their boundaries. Commerce and Industry Districts reflect the geographic variation in the concentration of land uses, as follows.

- The **Financial District** includes the city's densest area with the highest concentration of employment and establishments.
- The **Civic Center** has high concentrations of institutional and government activities.
- The **Van Ness** district encompasses a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission and North Beach** districts have intense local retail activities and distinct identities for the local and visitor populations.
- The **South of Market (SoMa)** district contains a unique mix of office, PDR, residential and other uses, and contains a historic building stock adaptable to a range of uses.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and has a relatively low density of population, employment, and establishments.
- The **North Central** district contains a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and more residential areas to the west.
- The **Southwest and Northwest** districts are predominantly residential, with businesses concentrated in mostly local-serving neighborhood commercial districts. Overall business density is low.
- The **Unclassified** category represents home-based business establishments and organizations without physical addresses, particularly care givers, which do not register a physical address with the state and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

Land Use Categories

The classification of land use categories used in the C&I, and more broadly by the Planning Department, is unique to San Francisco. It was developed to facilitate the evaluation of economic information – such as employment, establishments, and transactions – related to land use policy development. The classification system matches type of economic activity with a corresponding type of land use, building structure, and land use pattern. The basis of this classification system is San Francisco's business activities and land use pattern. Thus, application of this land use classification system outside of San Francisco would require some adjustments.

The six Land Use categories include (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) Residential. The Residential land use category is used only in Appendix Chapter 6 for data on building permits and land use by plan areas. The definitions of each of these categories follows:

- **Office activity** includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services; and walk-in customer facilities such as bank branches.

- **Retail activity** includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, and beauty shops.
- **Production/Distribution/Repair (PDR) activity** includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel activity** is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE) activities** cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/

caretakers, and other household maintenance workers. Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Industry Groups

The Inventory uses the *North American Industry Classification System (NAICS)*. The NAICS classifies all business establishments based on similarity of business process used to produce goods or services. NAICS organizes all economic activity into 20 broad sectors to clearly establish and distinguish each industry sector from the other.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS industry sectors (see Appendix Table 1.1):

- (1) Farm;
- (2) Natural Resources, Mining and Construction;
- (3) Manufacturing;
- (4) Trade, Transportation, Utilities;
- (5) Information;
- (6) Financial Activities;
- (7) Professional and Business Services;
- (8) Educational and Health Services;
- (9) Leisure and Hospitality;
- (10) Other Services; and
- (11) Government.

The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity of employee engagement.

Infographic Highlights

2013 Commerce &
Industry Inventory

SUMMARY

2013

Change from 2012

JOBS

612,660

▲ 5%

SEE TABLE 2.1

UNEMPLOYMENT RATE

5.7%

▼ FROM 7.8%

SEE TABLE 2.1A

ESTABLISHMENTS

55,170

▼ 0.5%

SEE TABLE 4.1

TOTAL WAGES CITYWIDE

\$52.5 BILLION

▲ 5%

SEE TABLE 5.1

AVERAGE WAGE PER JOB

\$85,660

▲ 0.3%

SEE TABLE 5.1A

BUILDING PERMITS

27,000

▲ 11%

SEE TABLE 6.1A

CONSTRUCTION SPENDING

\$5.2 BILLION

▲ 27%

SEE TABLE 6.1B

TAXABLE RETAIL SALES

\$18.5 BILLION

▲ 16%

SEE TABLE 6.2

CITY REVENUE

\$4.5 BILLION

▲ 5%

SEE TABLE 6.3

JOBS



BUILDING PERMITS



CONSTRUCTION SPENDING



CITY EXPENDITURE

\$4.35 BILLION

▲ 7%

SEE TABLE 6.3

SAN FRANCISCO IN THE REGION

Small area. Larger role.



2013 POPULATION

SEE TABLE 2.1

836,600

San Francisco

7,420,500

Region



11%

San Francisco's share of regional population.

San Francisco's population is at a record high.

POPULATION CHANGE

SEE TABLE 2.1

5.1% ▲

2004 - 2013
(10 YEAR)

6.5%

1.4% ▲

2012 - 2013
(1 YEAR)

1.3%

San Francisco

Region

The city and region continue to add residents.

2013 JOBS

SEE TABLE 2.1 & 2.2

612,650

San Francisco

3,446,900

Region



18%

San Francisco's share of regional jobs.

The number of jobs in the city surpasses previous high of 608,000 in 2000.

JOB GROWTH

SEE TABLE 2.1 & 2.2

17% ▲

2004 - 2013
(10 YEAR)

7% ▲

4.5% ▲

2012 - 2013
(1 YEAR)

7.2% ▲

San Francisco

Region

Employment growth in San Francisco outpaced that of the region from 2004-2013.

2013 UNEMPLOYMENT RATE

SEE TABLE 2.1

5.7%

San Francisco

▼ FROM 2012

6.7%

Bay Area

▼ FROM 2012

8.9%

State

▼ FROM 2012

San Francisco's unemployment rate is lower than the Bay Area's and State's rates.

SHARE OF JOBS BY SECTOR 2013

SEE TABLE 2.2

Employment Sector	San Francisco	Region
MANUFACTURING	2%	5%
TRADE, TRANSPORTATION & UTILITIES	11%	10%
FINANCIAL ACTIVITIES	8%	9%
PROFESSIONAL & BUSINESS SERVICES	25%	17%
LEISURE & HOSPITALITY	14%	10%

San Francisco's economy has higher concentrations of financial, business and visitor services than the region, and less manufacturing, trade, transportation and utilities.

EMPLOYMENT IN SAN FRANCISCO

Employment
up 5% in the
past year,
17% over the
decade.



Employment varied over the decade.

SEE TABLE 1.1

SHARE OF JOBS BY LAND USE

Land Use Category	2004	2012	2013	2004-13
OFFICE	38%	40%	40%	26%
RETAIL	18%	18%	18%	18%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	17%	13%	13%	-12%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	25%	23%	26%	22%
HOTEL	4%	3%	3%	--
PRIVATE HOUSEHOLDS	--	4%	--%	--

CHANGE IN # OF JOBS

JOB CONCENTRATION BY LAND USE + C&I DIST

Highest concentration	2nd highest concentration
FINANCIAL 53%	SOMA 24%
SOMA 21%	FINANCIAL 18%
SOMA 37%	FINANCIAL 27%
NORTH CENTRAL 27%	SOUTHWEST 17%
FINANCIAL 36%	CIVIC CENTER 27%
SOUTHWEST 20%	NORTH CENTRAL 18%

SEE TABLE 1.1

SEE TABLE 1.1

Office land use
has most jobs.

All land uses added jobs over
the decade, except PDR.

40%

Share of office land
use jobs, 2013



-12%

Change in PDR land
use jobs, 2004-2013

Office, Retail and PDR
jobs concentrated in
Financial and SOMA
C&I Districts. Hotels
are concentrated in
the Financial and Civic
Center districts. Other
jobs more dispersed.

ESTABLISHMENTS IN SAN FRANCISCO

Establishments down 0.5% from 2012.

TOTAL ESTABLISHMENTS (2013)

55,171







SEE TABLE A.1

-0.5%

Change from 2012

BY LAND USE CATEGORY

SEE TABLE A.2

Non Private Household		2013	Change 2004-13	
	OFFICE	15,542	25%	14%
	RETAIL	7,947	16%	4%
	PRODUCTION / DISTRIBUTION / REPAIR (PDR)	4,596	9%	-8%
	CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	25,597	50%	37%
	HOTEL	305	1%	-7%
		50,987	100%	▲ 6%
Private Household				
	PRIVATE HOUSEHOLDS	4,184	100%	--



BY NUMBER OF EMPLOYEES

SEE TABLE A.3

	Firms	
<i>Excluding Private Household</i>		
0 - 4	35,742	70%
5 - 49	13,366	26%
50 - 99	1,004	2%
100 - 249	607	1%
250 +	268	1%
	50,987	100%



LAND USE & BUILDING IN SAN FRANCISCO

Land Area

TOTAL LAND AREA

47 SQ. MILES

DEVELOPED

71% 988 MILLION Sq. ft.

STREETS & FREEWAYS

29%

DEVELOPED LAND AREA (988M SQ. FEET)

SEE TABLE 6.5

Land Use Category

OFFICE	2%
RETAIL	2%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	6%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	7%
HOTEL	0%
RESIDENTIAL	43%
MIXED USE / OTHER	7%
PUBLIC / OPEN SPACE	29%
VACANT	5%



Office Space

2013 TOTAL OFFICE SPACE

75.6 MILLION Sq. ft. $\uparrow 0.3\%$ $\uparrow 7\%$

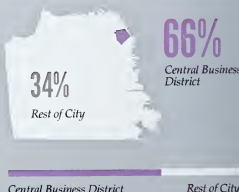
Change from 2012

Change from 2004

4.8 million square feet of office space added over the last ten years.

SHARE OF OFFICE SPACE

SEE TABLE 6.5



Most of the city's office space is in the Central Business District.

Building Permits

2013 BUILDING PERMITS

27,002

Active building permits

+11%

Change from 2012

0%

Change from 2004

2013 BUILDING PERMIT STATUS

64%

Complete



1% Approved

BY CONSTRUCTION COST

\$5.3 BILLION

+27%

\$1.1 billion change from 2012

BY # OF PERMITS



Land Use Category

RESIDENTIAL	66%
OFFICE	16%
RETAIL	9%
CIE	3%
PDR & HOTEL	2%

BY CONSTRUCTION COST



Land Use Category

RESIDENTIAL	59%
OFFICE	29%
RETAIL	4%
CIE	3%
HOTEL	2%
OTHER	2%
PDR	1%

BY # OF PERMITS



District Location

SOUTHWEST	31%
FINANCIAL	14%
NORTH CENTRAL	13%

BY CONSTRUCTION COST



District Location

SOMA	27%
FINANCIAL	23%
SOUTHWEST	8%

Construction spending is highest in residential and office projects, and in the SoMa and Financial C&I districts.

The majority of permits are for Residential and Office projects.

TRANSPORTATION IN SAN FRANCISCO

Driving alone to work is down.

Transit and bike commuting are up.

HOW EMPLOYEES IN SAN FRANCISCO COMMUTED TO WORK

Mode	2008	2013	Change
DRIVE ALONE	37%	35%	▼
CARPPOOL / VANPOOL	11%	11%	--
TRANSIT	36%	38%	▲
WALK	7%	7%	--
BICYCLE	2%	3%	▲
WORK AT HOME	5%	5%	--
OTHER	2%	2%	--

SEE TABLE 7.1



PRIVATE VEHICLE OCCUPANCY (2006 - 2013)

SEE TABLE 7.2

1.14

2006

PERSONS PER VEHICLE

1.14

2013

DAILY MUNI RIDERSHIP (2009 - 2013)

SEE TABLE 7.3

681,870

2009

684,000

2013

Daily MUNI ridership
up 0.3% since 2009.

BUSIEST MUNI LINES

SEE TABLE 7.4

Line	2009 Daily Trips	2013	Change
9 SAN BRUNO	44,900	58,700	▲
38 GEARY	55,900	57,500	▲
N JUDAH	45,600	42,900	▼
14 MISSION	43,200	40,200	▼

TRANSIT IMPACT DEVELOPMENT FEE REVENUE

SEE TABLE 7.5

\$4.7 MILLION

FY 2012-2013

CITY GOVERNMENT

Revenues up 5%.

Spending on services up 7%.

2013 CITY REVENUE

SEE TABLE 1.1

\$4.49 BILLION

▲ 5% FROM 2012

Revenue Source

PROPERTY TAXES	32%
BUSINESS TAXES	11%
OTHER LOCAL TAXES	20%
LICENSES, PERMITS, FINES & PENALTIES	2%
INTEREST & INVESTMENT INCOME	0%
RENTS & CONCESSIONS	2%
INTERGOVERNMENTAL	25%
CHARGES FOR SERVICES	6%
OTHER	2%



2013 CITY EXPENDITURES

SEE TABLE 1.2

\$4.35 BILLION

▲ 7% FROM 2012

Expenditure Function

PUBLIC PROTECTION	26%
PUBLIC WORKS, TRANSPORTATION & COMMERCE	5%
HUMAN WELFARE & NEIGHBORHOOD DEVELOPMENT	22%
COMMUNITY HEALTH	17%
CULTURE & RECREATION	8%
GENERAL ADMINISTRATION & FINANCE	5%
GENERAL CITY RESPONSIBILITIES	2%
DEBT SERVICE	6%
CAPITAL OUTLAY	9%



Findings: San Francisco Economy in 2013

**Record
Employment.**

**Recovery
Continues.**

SUMMARY

Employment Grows – Economic Recovery Continues

A quick review of the main data in the *Commerce & Industry Inventory* reveals many positive signs, indicating strong economic growth in 2013.

- Employment, the simplest key indicator of economic activity, grew 5% over 2012, to 612,660 jobs (26,400 additional jobs). This is the highest in the city's history.
- The unemployment rate fell to 5.7% from 7.8%.
- The number of business establishments decreased slightly to 55,170 firms, down 0.5% from 2012.
- Workers' earnings in the San Francisco economy increased to \$52.5 billion, almost 5% over 2012, with average earnings per job increasing to \$85,660 per worker.
- Building permit applications increased 11% over 2012 levels to 27,000 applications, and the estimated value or spending those projects represent in terms of project cost (not all of which will be spent locally in San Francisco) increased to \$5.2 billion, or 27% over 2012.
- Taxable retail sales increased 16% over 2012 levels, to \$18.5 billion.
- City revenue was \$4.5 billion, up 5% over 2012.
- City expenditures were \$4.35 billion in 2013, up 7% from last year.

SAN FRANCISCO IN THE REGION

Small Area / Large Role

Although San Francisco is less than one percent (0.7%) or 47 square miles out of the 7,041 square miles of the region, it is 17 times denser (population per square mile), has 11% of regional residents, and captures 18% of regional employment.

San Francisco's population increased 1.4% in the past year, to 836,600 residents. This represents a 5% increase over the past decade. In comparison, the regional population of 7.42 million increased 1.3% from 2012-2013 and 6.5% between 2004 and 2013.

Employment in San Francisco grew by 5% (over 26,000 jobs) in 2013, to 612,660 jobs. Over the past decade, this represents a 17% increase in employment in the city. In comparison, regional employment grew 7% between 2004 and 2013, to 3.45 million jobs.

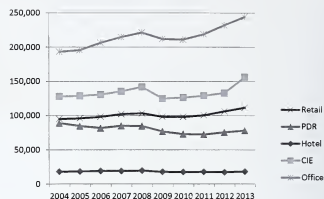
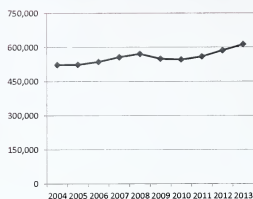
San Francisco's share of regional employment by sector has remained stable between 2004 and 2013. However, the *Share of Jobs 2013* table below shows that San Francisco's economic profile differs from the region. It has about the same relative share of employment in the Information sector as the region, but less in Manufacturing, and more in services (Financial, Professional & Business, and Leisure and Hospitality).

San Francisco's declining unemployment rate - 5.7% in 2013 - was lower than the regional rate of 6.7% and the State rate of 8.9%.

Share of Jobs 2013

<i>Employment Sector</i>	<i>San Francisco</i>	<i>Comparison</i>	<i>Region</i>
Information	4%	Same	4%
Manufacturing	1%	Less	9%
Financial Services	8%	More	5%
Prof. & Business Services	25%	More	19%
Leisure & Hospitality	14%	More	11%

San Francisco Employment by Land Use Category



EMPLOYMENT

Trends

The composition and changes in employment are an important window on San Francisco's economic vitality. Employment in San Francisco rose and fell over the last 10 years. The lingering effects of the dot.com crash caused employment in San Francisco to reach a low of 523,000 jobs in 2004 and 2005. Employment then rose 9.1% to 571,000 jobs in 2008 at the height of the speculative financial bubble, before the global recession caused a 4.5% dip to 546,000 jobs in 2010. However, after showing signs of recovery in 2011 and 2012, employment in San Francisco grew 5% in 2013, to an all-time high of 612,650 jobs.

As the *San Francisco Employment by Land Use Category* graphs illustrate, jobs in the office, CIE, retail, and hotel land use categories followed a pattern similar to total jobs: a peak in 2008 and troughs in 2004 and 2010.¹ PDR jobs, however, show a longer term decline, falling early in the period, posting minor gains in 2007 (4% over 2006), and declining further after the financial crisis in late 2008. PDR jobs appear to have stabilized after 2010, and, mirroring the larger economy, grew by 3% in 2013.

Sectoral Composition and Geographic Concentration

The share of employment by land use category, and their relative ranking, has remained stable between 2004 and 2013 (see *Employment by Land Use* table below). The office land use had 40% of total employment, followed by CIE with 25%, Retail at 18%, PDR at 13%, Hotel with 3%, and Private Household at 1%. PDR was the exceptional land use category, beginning the period with 17% share of employment and ending with 13%.

Employment by Land Use

Land Use Category	Sector Shares			Rate of Change	
	2004	2012	2013	2004-13	2012-13
Office	37%	40%	40%	26%	5%
Retail	18%	18%	18%	18%	5%
PDR	17%	13%	13%	-12%	3%
Hotel	4%	3%	3%	--	4%
CIE	24%	22%	25%	22%	18%
Pvt HH	-	4%	1%	na	-81%
TOTAL	523,275	586,257	612,656	17%	5%

1. CIE employment from 2002-2008 estimated based on the share of private household to total CIE employment in years 2009-2012.

PDR Counterpoint

Although the declining long-term trend in PDR employment can be attributed to economic restructuring in the larger economy, the 12% loss in PDR jobs between 2004 and 2013 also captures the effects of two economic downturns related to the dot.com bust of 2000 and the financial crisis of 2008. The difference that a growing economy can make is evident in the 4% PDR employment gains both in the past year and in 2006 during the speculative growth preceding the financial crisis. As a result, it is instructive to examine both the 2004-13 decline in PDR jobs and the 2006-07 and 2012-13 increases by sector, as illustrated in the *PDR Jobs by Sector* table below.

An examination of PDR subsectors reveals some interesting points. Losses in utility and apparel manufacturing jobs across all periods indicates a structural decline in those sectors, independent of the economic crises. Sectors with large losses over the 10-year period but smaller one-year losses or gains are likely connected to the cycles of the larger economy and follow it. These include construction, transportation, information, food manufacturing, printing and publishing.

On the other hand, steady increases in the wholesale and “Other Manufacturing” categories indicate that those sectors are relatively stable, possible areas of PDR job growth in San Francisco.

Change in PDR Jobs by Sector

Industry Group	2004-13	2006-07	2012-13
Construction	-10%	12%	5%
Transportation	-22%	-1%	2%
Utilities	-20%	-26%	--
Information	-13%	35%	7%
Wholesale	8%	5%	11%
Food Manufacturing	-13%	-4%	7%
Apparel Manufacturing	-64%	-10%	-2%
Printing & Publishing	-12%	4%	-7%
Other Manufacturing	37%	23%	3%
TOTAL	-12%	4%	4%

Spotlight on Tech

PDR ‘Information’ jobs, as defined in this report, include subsectors such as broadcasting and telecommunications, and generally exclude the types of jobs associated with today’s tech industry. Tech jobs fall within a variety of NAICS classification codes which, in this report, are classified under the ‘Office’ land use category for the most part. To track the trajectory of technology jobs over the past decade, the following occupations are examined:

5112: Software Publisher

5179: Other Telecommunications

5182: Data Processing, Hosting and Related Services

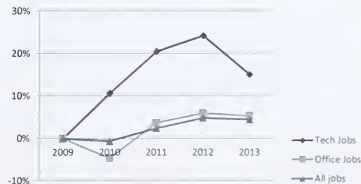
5415: Computer Systems Design and Related services

San Francisco’s technology sector has grown by almost 48% (18,000 jobs) since 2009, to 37,604 jobs in 2013. For comparison, employment overall in the city grew by 10% over that same period. Growth in the above occupations accounted for 77% of all office jobs added in San Francisco since the 2008 recession. Though growing faster than the economy as a whole, the tech sector still represents a fairly small proportion (6%) of jobs in San Francisco. Tech jobs pay an average of \$154,000 and are highly concentrated in the Financial (56%) and SoMa (32%) C&I districts.

Tech Sector Employment 2009-2013

	Year				Change	
	2009	2010	2011	2012	2013	2009-13
Tech Jobs (#)	19,722	21,828	26,307	32,683	37,604	17,882
Growth (%)		11%	21%	24%	15%	48%

Change in Tech, Office and Total Jobs 2009-2013



ESTABLISHMENTS

San Francisco had 55,171 establishments in 2013, a 0.5% decrease from 2012. Approximately 8% of these, or 4,180 establishments, were private households,² most likely employing less than five workers per establishment. To understand San Francisco establishments better, private household establishments were separated from non-household firms. The 50,990 non-household firms make up 92% of San Francisco establishments in 2013. By land use category, 50% are CIE, 25% are Office land uses, 16% are Retail, 9% are PDR and 1% are Hotel.

Private household establishments are located in residences and in areas designated for residential land use. Like home-based businesses, they are a secondary commercial use that supports and does not displace or otherwise change the primary residential use. They can be accommodated in residential land uses and do not require the land use policy attention that commercial uses require.

The 29% increase in total establishments (55,171) between 2004 and 2013 corresponds with employment growth over the same period. Change by land use type reveals establishment losses in PDR and hotel uses over the period, but substantial gains in office, retail and CIE (14%, 4% and 37%, respectively). Non-private household establishments increased by 19%.

In terms of firm size, 70% of non-household establishments in San Francisco employ fewer than 5 workers (see *Establishments 2013 (Non-Private Household)* table below), and 26% employ 5-49 workers. Of the remaining 4% of establishments, 2% (1,004 firms) employ 50-99 workers, 2% (607 firms) employ 100-249 workers, and 1% (268 firms) employ 250 or more workers.

2. The Private household establishment and land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, house cleaners, butlers, private caregivers, gardeners, grounds keeper/caregivers, and other household maintenance workers.

Establishments

Land Use	Number			Share 2013	Change	
	2004	2012	2013		2004-13	2012-13
Office	10,983	11,939	12,542	25%	14%	5%
Retail	7,651	7,666	7,947	16%	4%	4%
PDR	4,984	4,500	4,596	9%	-8%	2%
Hotel	329	297	305	1%	-7%	3%
CIE	18,736	4,930	25,597	50%	37%	419%
Subtotal	42,683	42,683	50,987	100%	19%	74%
Pvt HH	0	26,140	4,184	8%	--	-84%
TOTAL	42,683	55,471	55,171	100%	29%	-1%

Establishments 2013 (Non-Private Household)

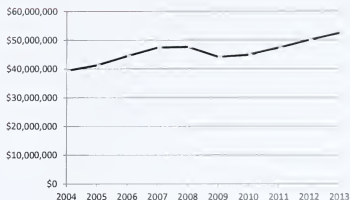
# of Employees	Number of Firms	Share
0-4	35,742	70%
5-49	13,366	26%
50-99	1,004	2%
100-249	607	1%
250+	268	1%
TOTAL	50,987	100%

MONETARY TRANSACTIONS

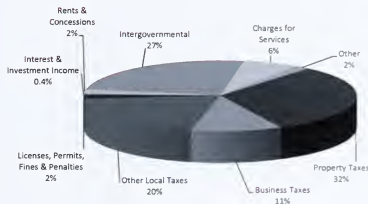
Wages

Wage and salary workers in San Francisco earned \$52.5B in 2012, up 5% from 2011 and 33% from 2004. Total wages followed the larger trend of the economy. Approximately 60% (\$31.5B) of the total is earned by workers in Office land uses with the balance earned by workers in the following land use sectors: 17% in CIE, 14% in PDR, 8% in Retail, and 2% in Hotel. Based on employment, the average wage in San Francisco is \$85,660, with workers in Office land uses earning the highest average wage (\$128,700), followed by workers in PDR uses (\$91,200). Workers in CIE, Hotel, and Retail earn less than the citywide average, at \$57,600, \$44,300, and \$35,000, respectively, and Private Household workers have the lowest average wage (\$18,300).

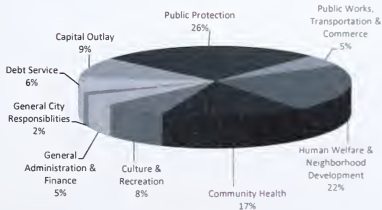
Total Wages 2013 (\$000s)



City Revenue 2013 (\$4.5 Billion)



City Expenditures 2013 (\$4.35 Billion)



Taxable Retail Sales

Taxable retail sales (all outlets) amounted to \$18.5B in 2013, a 13% increase over 2012. Changes over time followed the larger economy.

City Revenues and Expenditures

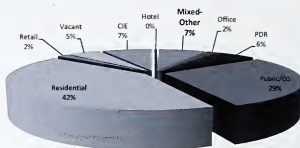
In Fiscal Year 2013 (July 1, 2012 through June 30, 2013), City revenues amounted to \$4.5B, up 5% over 2012. City expenditures were lower than revenues, at \$4.35B, but grew 7% over 2012. Property Taxes were the largest revenue source at 32%, followed by Intergovernmental Transfers at 25%, Other Local Taxes at 20% and Business Taxes at 11%. Public Protection (police and fire) were the highest City expenditures at 26%, with Human Welfare and Neighborhood Development following at 22%, and Community Health the third highest at 17%.

LAND AREA AND BUILDING

Land Area

San Francisco has 46.9 square miles of land area, of which 71% is developed (988 million square feet), while the remaining 29% are used for streets or freeways. Residential uses form the majority of San Francisco's land use footprint, occupying 42% of the city's land area. At 29%, Public and Open Space are the second biggest land uses, followed by Commercial uses at 17% (6% PDR, 2% Office, 0.4% Hotel, and 7% CIE). Mixed uses occupy 7% of the area while 5% of land area is vacant.

Developed Land Area (988M sf)



Building Permit Applications

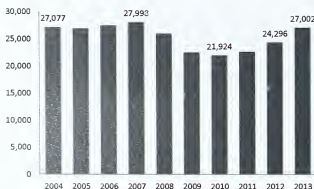
In 2013, there were 27,002 active building permit applications, an increase of 11% over 2012, but 4% below the 2007 peak of 27,998 applications. Approximately 96% of building permit applications were for demolition or alteration projects compared to new construction. Most of the applications were for Residential land uses (66%), with 16% for Office, 9% for Retail, 3% for CIE, and 1% each for PDR and Hotel uses. Approximately 64% of active building permit applications completed construction in 2013, with another 28% issued but not yet complete, 0.6% approved but not yet issued, 0.4% cancelled, and 6.9% not yet acted upon, abandoned, reinstated, or appealed (Other). Applications were for projects located mostly in the Southwest (31%), the Financial (14%), and the North Central (13%) C&I districts.

The total value of building permit applications in terms of estimated construction cost was \$5.3 billion in 2013, a 98% increase over 2004 (\$2.7B) and a 27% increase from 2012 (\$4.1B). New construction projects construction costs represented 49% or \$2.4B in value compared to \$2.6B, or 51%, for demolition/alteration applications. Approximately 59% of the building permit applications' cost was for residential projects, while 30% was for Office, 4% for retail, 3% for CIE, 2% for Hotel, and 0.6% for PDR projects. The C&I districts with the highest concentration of construction costs were the SOMA (27%) and Financial (23%) districts.

Central Business District (CBD) Office Space

Of the 74 million square feet of office space in San Francisco, approximately 66% is in the Central Business District (generally the Financial District north and south of Market Street). Total office space has increased 4% or 3.0 msf in San Francisco since 2004. In the CBD, office space increased about 2% from 2004-2013, or 0.9 msf.

Building Permit Applications



Building Permit Applications by Type 2013

Land Use	Number (Share of 27,002)			Construction Cost (Share of \$5.3B) (2013 \$ 000s)		
	Total	New	Alterations	Total	New	Alterations
Office	16%	0.03%	16%	30%	9%	21%
Retail	9%	0.03%	9%	4%	0.07%	4%
PDR	1%	0.03%	1%	0.6%	0.34%	0.28%
Hotel	1%	0.01%	1%	2%	0.93%	1%
CIE	3%	0.04%	3%	3%	0.52%	2%
Residential	66%	0.57%	65%	59%	40%	20%
Other	4%	0.03%	2%	2%	0.26%	1%
Total	27,002	200	26,045	\$5,264,379	\$2,656,458	\$2,568,561
Shares	100%	0.74%	96.5%	100%	51%	49%

TRANSPORTATION

The *Commerce & Industry Inventory* presents basic data on San Francisco mobility in terms of commute mode split, parking entitlements, vehicle occupancy, transit ridership, and the Transit Impact Development Fee Revenue (TIDF).

Commute Mode Split

Data on mode split from 2008 and 2013 for workers commuting to San Francisco jobs (from within and outside the city) indicate stability over the period, with small changes in share between the two years. In 2013, 35% of commute trips were made "driving alone," down 1 point from 36.5% in 2008. Transit share increased 1 point, from 36.4% in 2008 to 37.5% in 2013, while walk and bike trips increased 1 point to 9.7% in 2013.

Private Vehicle Occupancy

Private vehicle occupancy during commute trips for workers commuting to San Francisco jobs (from within and outside the city) between 2006 and 2013 remained constant at 1.14.

Commute Mode Split

	2008	2012	2013	2008-2013	2012-2013
Drive Alone	36.5%	35.0%	35.3%	-1.2%	0.3%
Carpool/Vanpool	11.1%	9.7%	10.5%	-0.6%	0.8%
Transit	36.4%	38.3%	37.5%	1.1%	-0.8%
Walk	6.7%	7.1%	7.1%	0.4%	-0.1%
Bicycle	2.0%	2.7%	2.6%	0.6%	-0.1%
Work at Home	5.3%	4.9%	5.0%	-0.3%	0.1%
Other	2.0%	2.2%	1.9%	-0.1%	-0.3%

Daily Transit Ridership

Route Nos.	Route Name	2009-2013	
		2009	2013
8X, 8AX, 8BX, 9, 9L	San Bruno	44,909	57,687
38, 38L, 38AX, 38BX	Geary	55,909	57,514
N, NX	Judah	45,576	42,855
14, 14L, 14X	Mission	43,208	40,225
SYSTEMWIDE		681,865	683,999

Daily Transit Ridership

Muni ridership increased 0.3% or 2,100 daily trips from 681,900 in 2009 to 684,000 in 2013. The 8x and 9-San Bruno lines were the most used with 57,700 trips, followed by the 38-Geary lines with 57,500 trips, the N-Judah at 42,900 trips, and the 14-Mission lines at 40,200 trips. Ridership on the San Bruno lines has grown 28% between 2009 and 2013 (see *Table 7.4* in the Appendix for details).

Transit Development Impact Fee

The Transit Impact Development Fee (TIDF) revenue was \$4.7 million in FY2013, up from \$1.7 million in FY2012. TIDF revenue varies annually with the economy. Total revenues collected since FY2004 amount to \$22.2M.

APPENDIX: ***Data 2013***

1.0 Introduction

This Data Appendix is organized into seven chapters.

- **Chapter 1 – Introduction** defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the series of Inventories to present the economic data in chapters 2 through 5.
- **Chapter 2 – Regional Overview** presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, employment, and unemployment indicators for the San Francisco Bay Area. This information is presented by four subregions of the Bay Area: North Bay, East Bay, South Bay, and San Francisco. Unemployment data for the Bay Area, California, and the United States are presented as well.
- **Chapter 3 – Employment** presents information on San Francisco's employment in three predefined data formats, which are: Industry Group, Land Use Category, and Commerce and Industry (C&I) District. These data formats are explained in Chapter 1 – Data Formats.
- **Chapter 4 – Establishments** reports the number of establishments as places where businesses are operated or where service and light industrial operations are performed. The chapter presents data on the number and distribution of active business establish-

ments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size-class.

- **Chapter 5 – Monetary Transactions** measures various aspects of the city's economy in monetary terms. This chapter provides data related to wages, taxable retail sales and sales permits, city government revenues and expenditures. Wage data are presented by Land Use Category. Taxable retail sales and permits data are presented by type of business. City government revenues and expenditures are reported by source and function.
- **Chapter 6 – Building and Land Use** provides information regarding construction activity in San Francisco. It presents the number of building permit applications and the total construction cost related to permit applications. The permit applications by permit status are reported only for the current year. This chapter also contains statistics on land use in San Francisco. The data in this chapter are derived from the San Francisco Department of Building Inspection and are summarized by neighborhood planning area rather than Commerce & Industry district boundaries used in chapters 2 through 5.
- **Chapter 7 – Transportation** describes recent trends in San Francisco's transportation and transit systems. This includes analysis of mode split (i.e., what kind of transportation people use to complete their trips), parking availability, vehicle occupancy (i.e., the number of people per private vehicle), transit service, and Transit Impact Development Fee (TIDF) revenues.

1.2 DATA FORMATS

The economic data in the Inventory are presented in terms of time, type of activity, and geographic distribution. The economic indicators are measured by their specific units such as employees, establishments, and dollars. The Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators by using three specific data formats or groupings of the data:

- Commerce and Industry Districts,
- Land Use Category, and
- Industry Group.

These data groups are discussed below. To the extent possible, the data in the Inventory, which are gathered from different sources, are aggregated into these three pre-defined formats. Some of the data remain in their original formats because of limited detail in the original data source.

Commerce & Industry Districts

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. Each district is defined by one or more postal zip codes because a zip code is traditionally the smallest geographical unit for which economic data are available. The district boundaries are as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to the economic data. The C&I district boundaries are shown on *Map 1.1*.

Commerce and Industry Districts are characterized by a concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities.

- The **Financial District** covers the densest area with the highest concentration of employment and establishments.
- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district runs along a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts are characterized by intense local retail activities and have very defined identities for the local and visitor population.
- The **South of Market** district contains a combination of office and PDR activities, located between the Financial District and Bayview.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and shows a low density in terms of population, employment, and establishments.



Commerce and Industry Districts San Francisco

0 Miles

MAP 1.1



District Boundaries

Zip Code Boundaries

- The **North Central** district concentrates a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential area to the west.
- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

Unclassified. In addition to the above ten zip code-based districts, there is an **Unclassified category**. This category represents home-based business establishments and organizations, particularly care-givers, that do not register a physical address with the State, and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

Plan Areas

The Inventory also provides information on geographic areas other than Commerce and Industry Districts. These areas are referred to as Plan Areas and are used exclusively in Chapter 6 (see *Map 6.2*). The neighborhood district boundaries tend to follow more homogenous economic patterns than the zip code-based Commerce and Industry districts.

Land Use Categories

This classification facilitates the evaluation of economic information – such as employment, establishments, and transactions – related to types of land use relevant to land use policy development. It matches the type of economic activity with a corresponding type of use and building structure as well as the prevalent land use pattern. This classification is based only on San Francisco's business activities and land use pattern. Its application outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) Residential. The Residential land use category is addressed only in Chapter 6 in the context of building permits and land use by plan areas. The definitions of each of these categories are as follows:

- **Office** activity includes professional services such as administration, legal services, architecture, engineer-

ing, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services; and walk-in customer facilities such as banking.

- **Retail** activity includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, and beauty shops.
- **Production/Distribution/Repair (PDR)** activity includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel** activity is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE)** activities cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories. They are often specialized facilities, many of which are non-profit organizations.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ

workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers. Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Industry Groups

This classification aggregates business establishments into Industry groups according to similarity of production process. The *North American Industry Classification System* (NAICS) is the current classification system. It was released in 1997 and last revised in 2007. It replaced the previous *Standard Industry Classification* (SIC) system based on similarity of product produced.

The United States Department of Commerce developed these two systems and the California Employment Development Department (EDD) adopted them. *Commerce & Industry Inventories 2002-2011* have a discussion of the relationship between the two classification systems because data from 2000 and earlier used the SIC system and data from 2001 onwards used the NAICS system (see *Tables 1.1 and 1.2*). *Commerce & Industry Inventory 2011* onwards, have an abbreviated discussion of the two classification systems because the 10-year time series uses the NAICS system exclusively.

The NAICS classifies all business establishments based on similarity of process used to produce goods or services. NAICS is a six-digit coding system. Under NAICS, the first two digits of the code are designated as sector to represent general categories of economic activities. The first three digits are designated as sub-sector to represent major categories of economic activities. The first four digits represent industry group, while the five and six digit classifications correspond to specific industries.

NAICS organizes all economic activity into 20 broad sectors (in contrast to the 10 sectors of the earlier SIC classification system). The purpose for this broad categorization is to clearly establish and distinguish each industry sector from another. NAICS also defined 350 new industries, including several new high-tech and services related industries which were not appropriately defined and recognized in the previous SIC system.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS' industry sectors (see *Table 1.1*): (1) Farm; (2) Natural Resources, Mining and Construction; (3) Manufacturing; (4) Trade, Transportation, Utilities; (5) Information; (6) Financial Activities; (7) Professional and Business Services; (8) Educational and Health Services; (9) Leisure and Hospitality; (10) Other Services; and (11) Government. The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

The Inventory also uses Land Use Categories, as discussed above, to organize data for land use policy making purposes. *Table 1.2* illustrates the correspondence between NAICS industrial sectors and San Francisco's Land Use Activity Categories.

Table 1.1

MAJOR INDUSTRY CLASSIFICATION CATEGORIES

<i>Industry grouping used in the Commerce And Industry Inventory</i>	<i>North American Industry Classification System (NAICS)</i>		
	<i>S.N.</i>	<i>Code</i>	<i>Sectors</i>
1. Farm	1	11	Agriculture, Forestry, Fishing and Hunting
2. Natural Resources, Mining and Construction	2	21	Mining
	3	23	Construction
3. Manufacturing	4	31-33	Manufacturing
4. Trade, Transportation, Utilities	5	48-49	Transportation and Warehousing
	6	22	Utilities
	8	42	Wholesale Trade
	9	44-45	Retail Trade
5. Information	7	51	Information
6. Financial Activities	10	52	Finance and Insurance
	11	53	Real Estate and Rental and Leasing
7. Professional and Business Services	12	54	Professional, Scientific, and Technical Services
	13	55	Management of Companies and Enterprises
	14	56	Administrative and Support, Waste Management and Remediation Services
8. Educational and Health Services	15	61	Education Services
	16	62	Health Care and Social Assistance
	17	71	Arts, Entertainment, and Recreation
9. Leisure and Hospitality	18	72	Accommodation and Food Services
10. Other Services	19	81	Other Services (except Public Administration)
11. Government	20	92	Public Administration

Note: S.N. = Sector Number

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

Table 1.2
CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

<i>Land Use Category</i>	<i>Industry Group</i>	<i>NAICS Code</i>
Office	Agriculture	111-115
		211-213
	Finance	522-523
	Insurance	524-525
	Real Estate	531, 533
		516
		518
	Office Services	519
		541
		551
Retail		561
	Public Administration	921-928
	General Merchandise	452
	Food Stores	445
	Apparel Stores	448
	Eating & Drinking Places	722
		441, 447
		442
	Other Retail Stores	443, 446, 451
		453-454
Production/Distribution/Repair (PDR)		532
	Personal & Repair	811-812
	Construction	236-238
		488
		485, 487
	Transportation and Warehousing	484, 492-493
		491
		481, 483
		486
	Utilities	221
Hotel		562
	Information	515
		517
	Wholesale	423-425
	Food Manufacturing	311-312
	Apparel Manufacturing	313-315
	Printing and Publishing	323, 511
		321-322, 337
		324-325
	Other Manufacturing	316, 326-327
Cultural/Institutional/Educational (CIE)		331-333
		334-335
	Repair Services	336
	Transp. Equipment, Building Supplies	339, 444
	Film & Sound Recording	512
	Accommodation	721
	Art and Recreation	711
	Performing arts, amusement parks	713
	Education Services	611
	Health Care	621-623
Private Households	Social Assistance	624
	Other CIE Services	712
		813
	Private Households (Pvt HH)	814
	Unclassified Establishments	999

Sources:
 Executive Office of The President
 Office of the Management and Budget
 San Francisco Planning Department



2.0 Regional Overview

San Francisco has diverse linkages to the region as well as to the state, national, and global economy. This chapter supplies basic demographic and economic information about the San Francisco Bay Area's nine counties. This information gives an understanding of San Francisco's economic base within a regional and historical context.

The nine counties of the San Francisco Bay Area are Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. *Map 2.1* shows the location of these counties, which have been grouped into four sub-regions for analysis in this chapter: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially identified in 1985 on the basis of observed travel patterns of commuters into San Francisco and availability of employment information. Although travel patterns have evolved since the initial observations, these sub-regions have been retained in order to maintain the consistency of the time series data in this chapter. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties.

The regional subdivision allows comparisons between San Francisco, North Bay, East Bay, and South Bay areas that represent the labor force base for San Francisco and the region. When reviewing the tables in this chapter, it is important to note that the Bay Area covers 7,041 square miles in total. The North Bay represents 53 percent of that total, the East Bay 21 percent, the

South Bay 25 percent, and San Francisco less than one percent of land area in the region. Population densities in San Francisco are by far the highest in the Bay Area.

This chapter presents two sets of tables and graphs. The first set describes the residents of each subregion regardless of where they work in terms of population, labor force, number of employed residents, and unemployment. These concepts are described below. For context, unemployment data is also provided for California and the United States. The second set describes the workers in each subregion regardless of where they live in terms of regional employment by industry groups and then regional employment by subregion by industry group.

Each economic indicator is reported in absolute numbers, annual percentage distribution, and percentage change over time. Unemployment figures are presented in terms of average annual rates.

- **Population** is defined as the total number of people who live in a specific area, such as a particular county or city. Population data comes from the California State Department of Finance (DoF). These data are based on the 2010 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% to 5% higher than those of the Census Bureau.

- **Labor Force** consists of persons who are either working or looking for work, excluding members of the armed forces. Labor force data are based on place of residence. For example, a worker who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. Labor force data are obtained from the California Employment Development Department (EDD).
- **Employment**, as used in this inventory and defined by EDD, includes persons who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives. These data do not include self-employed, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.
- **Unemployment** is defined as civilians 16 years and older, not at work, who were actively looking for work during the last four weeks, and were available to accept a job or who were waiting to be called back to jobs from which they had been laid off. Civilian unemployment data are based on place of residence. The unemployment data are from EDD, the United States Department of Commerce, and U.S. Census Bureau.

Employment data reported by industry group are based on EDD data. These data are organized by using the North American Industry Classification System (NAICS), as discussed in Chapter 1.



**Bay Area Counties and
Commerce and Industry Sub-Regions**

MAP 2.1

Table & Figure 2.1.1

BAY AREA POPULATION BY SUB-REGION, 2004-2013

This table presents the number of residents in each Bay Area sub-region for the last ten years, as well as the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Population trends are shown in Figure 2.1.1 below.

Population by Sub-Region (000s)

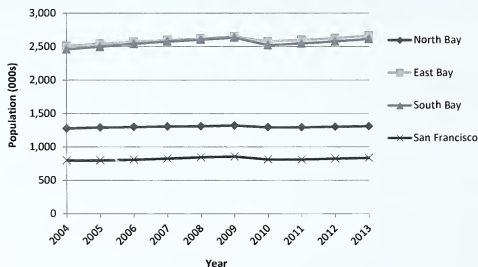
Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	1,275.6	1,290.6	1,298.5	1,305.3	1,309.5	1,320.7	1,294.0	1,293.8	1,301.2	1,309.8
East Bay	2,505.9	2,539.7	2,568.5	2,594.7	2,617.1	2,647.9	2,577.2	2,597.3	2,623.4	2,660.3
South Bay	2,459.7	2,497.4	2,541.6	2,576.5	2,603.5	2,635.2	2,522.1	2,545.9	2,577.9	2,613.8
San Francisco	795.0	798.7	808.8	824.5	845.6	856.1	812.1	812.5	825.1	836.6
TOTAL	6,968.7	7,036.2	7,126.3	7,217.4	7,375.7	7,459.9	7,205.4	7,249.6	7,327.6	7,420.5

Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	18.3	18.3	18.2	18.1	17.8	17.7	18.0	17.8	17.8	17.7
East Bay	36.0	36.1	36.0	36.0	35.5	35.5	35.8	35.8	35.8	35.9
South Bay	35.3	35.5	35.7	35.7	35.3	35.3	35.0	35.1	35.2	35.2
San Francisco	11.4	11.4	11.4	11.4	11.5	11.5	11.3	11.2	11.3	11.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
North Bay	1.2	0.6	0.5	0.3	0.9	-2.0	0.0	0.6	0.7
East Bay	1.3	1.1	1.0	0.9	1.2	-2.7	0.8	1.0	1.4
South Bay	1.5	1.8	1.4	1.0	1.2	-4.3	0.9	1.3	1.4
San Francisco	0.5	1.3	1.9	2.6	1.2	-5.1	0.1	1.5	1.4
TOTAL	1.0	1.3	1.3	2.2	1.1	-3.4	0.6	1.1	1.3



Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source:

US Census, CA Department of Finance, E-1 City / County Population Estimates.

Table & Figure 2.1.2

BAY AREA LABOR FORCE BY SUB-REGION, 2004-2013

This table presents the number of residents in the labor force in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Labor force trends are shown in Figure 2.1.2 below.

Residents in the Labor Force by Sub-Region (000s)

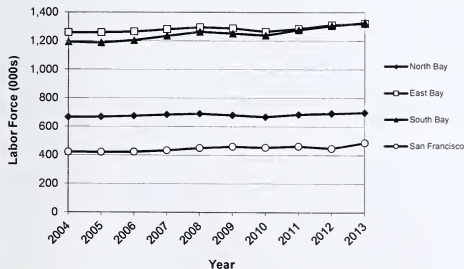
Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	665.6	668.3	674.9	684.3	690.4	679.9	668.1	684.6	692.0	698.5
East Bay	1,259.2	1,259.7	1,265.2	1,281.5	1,295.7	1,288.6	1,264.5	1,285.0	1,311.7	1,322.0
South Bay	1,193.5	1,187.5	1,204.9	1,234.7	1,264.3	1,252.0	1,238.7	1,276.5	1,305.3	1,326.8
San Francisco	422.3	420.5	422.5	433.3	450.4	459.8	453.8	462.5	447.6	487.2
TOTAL	3,591.7	3,540.6	3,536.0	3,567.5	3,700.8	3,680.3	3,625.1	3,708.6	3,756.6	3,834.5

Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	18.5	18.9	19.1	19.2	18.7	18.5	18.4	18.5	18.4	18.2
East Bay	35.1	35.6	35.8	35.9	35.0	35.0	34.9	34.6	34.9	34.5
South Bay	33.2	33.5	34.1	34.6	34.2	34.0	34.2	34.4	34.7	34.6
San Francisco	11.8	11.9	11.9	12.1	12.2	12.5	12.5	12.5	11.9	12.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
North Bay	0.4	1.0	1.4	0.9	-1.5	-1.7	2.5	1.1	0.9
East Bay	0.0	0.4	1.3	1.1	-0.5	-1.9	1.6	2.1	0.8
South Bay	-0.5	1.5	2.5	2.4	-1.0	-1.1	3.1	2.3	1.6
San Francisco	-0.4	0.5	2.6	3.9	2.1	-1.3	1.9	-3.2	8.8
TOTAL	-1.4	-0.1	0.9	3.7	-0.6	-1.5	2.3	1.3	2.1

**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source: CA Employment Development Department, annual averages (not seasonally adjusted)

Table & Figure 2.1.3

BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 2004-2013

This table presents the number of employed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Employment trends are shown in Figure 2.1.3 below.

Employed Residents by Sub-Region (000s)

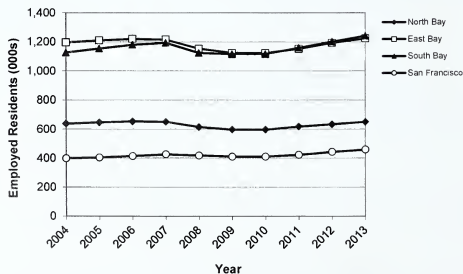
Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	637.6	646.7	653.2	650.3	614.7	596.8	596.8	617.9	633.1	650.5
East Bay	1,196.2	1,209.7	1,220.6	1,215.5	1,153.0	1,124.4	1,124.4	1,151.6	1,193.5	1,224.9
South Bay	1,126.8	1,153.7	1,179.7	1,193.3	1,123.6	1,116.4	1,116.4	1,159.5	1,202.2	1,241.9
San Francisco	399.0	404.7	414.6	426.7	418.4	410.7	410.7	422.7	442.8	459.3
TOTAL	3,335.4	3,359.6	3,414.8	3,485.8	3,309.7	3,248.3	3,248.3	3,351.7	3,471.6	3,575.8

Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	19.1	19.2	19.1	18.7	18.6	18.4	18.4	18.4	18.2	18.2
East Bay	35.9	36.0	35.7	34.9	34.8	34.6	34.6	34.4	34.4	34.2
South Bay	33.8	34.3	34.5	34.2	33.9	34.4	34.4	34.6	34.6	34.7
San Francisco	12.0	12.0	12.1	12.2	12.6	12.6	12.6	12.6	12.8	12.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
North Bay	1.4	1.0	-0.4	-5.5	-2.9	0.0	3.5	2.5	2.7
East Bay	1.1	0.9	-0.4	-5.1	-2.5	0.0	2.4	3.6	2.6
South Bay	2.4	2.3	1.2	-5.8	-0.6	0.0	3.9	3.7	3.3
San Francisco	1.4	2.4	2.9	-1.9	-1.8	0.0	2.9	4.8	3.7
TOTAL	0.7	1.6	2.1	-5.1	-1.9	0.0	3.2	3.6	3.0

**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Source:

CA Employment Development Department, annual averages (not seasonally adjusted).

Table 2.1.4
BAY AREA UNEMPLOYMENT BY SUB-REGION, 2004-2013

This table presents the number of unemployed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Finally, this table also includes unemployment rates over the last ten years for each sub-region, as well as for California and the United States to provide context. Unemployment rate trends are shown in Figure 2.1.4 on the following page.

Unemployment by Sub-Region (000s)

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	34.2	30.7	28.2	31.1	39.9	65.3	69.8	66.6	59.0	47.9
East Bay	72.8	63.5	55.5	60.9	80.1	135.6	140.2	133.4	118.2	97.8
South Bay	73.0	60.7	51.2	55.0	70.9	128.4	122.2	117.0	103.1	85.0
San Francisco	25.2	21.5	17.8	18.7	23.7	41.5	43.2	39.8	34.9	27.9
TOTAL	205.2	176.4	152.7	165.7	214.6	370.8	375.4	356.8	315.2	258.6

Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	16.7	17.4	18.5	18.8	18.6	17.6	18.6	18.7	18.7	18.5
East Bay	35.5	36.0	36.3	36.8	37.3	36.6	37.3	37.4	37.5	37.8
South Bay	35.6	34.4	33.5	33.2	33.0	34.6	32.6	32.8	32.7	32.9
San Francisco	12.3	12.2	11.7	11.3	11.0	11.2	11.5	11.2	11.1	10.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Sub-Region	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
North Bay	-10.2	-8.1	10.3	28.3	63.7	6.9	-4.6	-11.4	-18.8
East Bay	-12.8	-12.6	9.7	31.5	69.3	3.4	-4.9	-11.4	-17.3
South Bay	-16.8	-15.7	7.4	28.9	81.1	-4.8	-4.3	-11.9	-17.6
San Francisco	-14.7	-17.2	5.1	26.7	75.1	4.1	-7.9	-12.3	-20.1
TOTAL	-14.0	-13.4	8.5	29.5	72.8	1.2	-5.0	-11.7	-18.0

Average Annual Rate

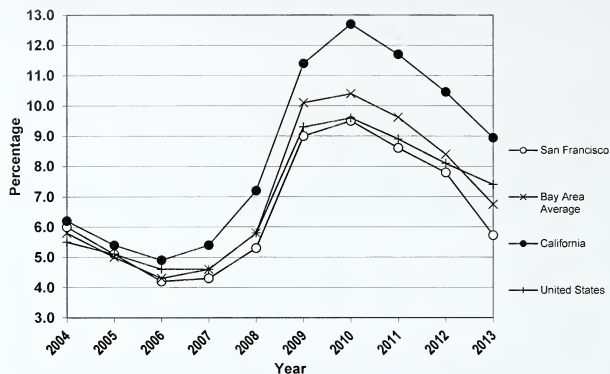
Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	5.1	4.6	4.2	4.5	5.8	9.6	10.4	9.7	8.5	6.9
East Bay	5.8	5.0	4.4	4.8	6.2	10.5	11.1	10.4	9.0	7.4
South Bay	6.1	5.1	4.2	4.5	5.6	10.3	9.9	9.2	7.9	6.4
San Francisco	6.0	5.1	4.2	4.3	5.3	9.0	9.5	8.6	7.8	5.7
Average	5.8	5.0	4.3	4.6	5.8	10.1	10.4	9.6	8.4	6.7

Average Annual Rate

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
California	6.2	5.4	4.9	5.4	7.2	11.4	12.7	11.7	10.5	8.9
United States	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4

Figure 2.1.4

BAY AREA UNEMPLOYMENT RATE BY SUB-REGION, 2004-2013



Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: City and County of San Francisco

Sources:

- CA Employment Development Department, annual averages (not seasonally adjusted).
- US Bureau of Labor Statistics: http://www.bls.gov/chs/prev_yrs.htm

Table 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 2004-2013

This table presents information about those who work in the Bay Area. It conveys the number of people working in each industry group. The breakdown for each Bay Area sub-region is presented in Tables 2.2.2 - 2.2.4. All tables utilize NAICS industrial categories for the entire period of analysis.

Number of Jobs (000s)

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Farm	25.4	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9	20.0
Natural Resources, Mining & Construction	187.6	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.1	154.4
Manufacturing	361.9	353.8	352.0	345.0	344.9	313.9	305.4	310.5	312.1	310.9
Trade, Transportation & Utilities	558.4	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8	547.5
Information	114.0	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4	136.2
Financial Activities	209.2	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0	173.9
Professional & Business Services	518.1	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8	642.1
Educational & Health Services	358.6	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2	520.7
Leisure & Hospitality	306.7	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2	374.0
Other Services	111.2	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9	117.0
Government	467.4	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7	450.2
TOTAL	3,218.5	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Farm	0.8	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Natural Resources, Mining & Construction	5.8	6.0	6.0	5.8	5.4	4.6	4.3	3.5	3.6	4.5
Manufacturing	11.2	10.9	10.7	10.4	10.4	10.0	9.9	10.0	9.7	9.0
Trade, Transportation & Utilities	17.3	17.3	17.2	17.2	17.0	16.6	16.5	16.5	16.4	15.9
Information	3.5	3.5	3.4	3.4	3.4	3.5	3.6	3.8	3.8	4.0
Financial Activities	6.5	6.6	6.5	6.2	5.8	5.7	5.5	5.5	5.4	5.0
Professional & Business Services	16.1	16.3	16.7	17.2	17.7	17.4	17.7	18.0	18.8	18.6
Educational & Health Services	11.1	11.2	11.4	11.4	11.8	12.6	13.3	13.3	13.2	15.1
Leisure & Hospitality	9.5	9.6	9.8	9.9	10.1	10.3	10.5	10.7	11.0	10.9
Other Services	3.5	3.4	3.3	3.3	3.4	3.4	3.5	3.5	3.5	3.4
Government	14.5	14.5	14.4	14.6	14.4	15.1	14.7	14.5	13.9	13.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Farm	-11.4	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1	5.8
Natural Resources, Mining & Construction	3.5	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.3	33.0
Manufacturing	-2.2	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.5	-0.4
Trade, Transportation & Utilities	0.7	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8	3.7
Information	-1.4	0.1	0.7	1.1	-3.3	0.1	5.8	4.4	11.3
Financial Activities	2.0	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7	-0.6
Professional & Business Services	2.2	3.8	4.1	2.8	-7.8	0.7	2.6	8.0	6.0
Educational & Health Services	1.0	3.0	1.8	3.0	0.8	3.9	1.3	2.5	22.5
Leisure & Hospitality	1.8	3.1	2.5	1.8	-4.1	0.3	3.1	5.7	6.2
Other Services	-0.7	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4	3.6
Government	0.8	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5	0.6
TOTAL	0.8	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4	7.2

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average, March Benchmark

Table 2.2.2

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2004-2013 – NUMBER OF JOBS

This table contains the disaggregation of Table 2.2.1 by Bay Area sub-regions.

Total Number of Jobs (000s)

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	494.0	497.0	501.9	503.4	497.8	467.3	459.2	453.8	461.9	497.0
East Bay	1,024.1	1,035.7	1,047.8	1,049.5	1,031.1	968.0	949.8	950.6	978.7	1,035.4
South Bay	1,196.6	1,202.6	1,215.5	1,238.2	1,243.8	1,165.5	1,158.2	1,178.6	1,217.6	1,305.9
San Francisco	503.8	509.2	520.9	539.5	549.4	524.3	521.7	526.5	557.9	608.6
Regional Total	3,218.5	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9

Farm

North Bay	13.5	12.5	12.7	13.1	12.8	12.9	12.0	12.0	12.4	13.3
East Bay	2.6	1.5	1.5	1.6	1.4	1.5	1.5	1.5	1.4	1.5
South Bay	8.9	8.4	5.7	5.7	5.7	5.4	5.3	5.0	4.9	5.0
San Francisco	0.4	0.1	0.3	0.2	0.3	0.3	0.2	0.2	0.2	0.2
Regional Total	25.4	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9	20.0

Natural Resources, Mining & Construction

North Bay	39.5	41.6	41.0	38.5	34.5	26.8	24.6	16.9	17.0	27.7
East Bay	70.3	75.1	74.6	73.6	65.8	54.7	48.7	48.5	50.6	57.3
South Bay	60.9	60.8	62.9	64.3	60.9	46.9	44.1	30.8	34.4	53.7
San Francisco	16.9	16.7	17.5	18.3	18.4	15.3	14.1	14.1	14.8	15.7
Regional Total	187.6	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.8	154.4

Manufacturing

North Bay	47.3	46.8	46.6	45.8	45.5	42.0	41.3	41.8	42.9	44.1
East Bay	99.1	95.4	96.9	93.7	93.3	82.5	78.6	79.1	80.3	78.6
South Bay	203.3	199.8	197.4	194.4	195.3	180.1	176.8	181.0	179.6	179.0
San Francisco	12.2	11.8	11.1	11.1	10.8	9.3	8.7	8.6	8.6	8.6
Regional Total	361.9	353.8	352.0	345.0	344.9	313.9	305.4	310.5	311.4	310.3

Trade, Transportation & Utilities

North Bay	89.4	90.1	90.6	91.3	89.4	82.3	82.2	83.4	85.4	87.8
East Bay	192.8	195.2	195.4	198.1	195.3	179.0	173.8	174.0	179.0	185.4
South Bay	206.5	207.2	208.4	212.7	210.9	193.7	191.2	193.5	198.4	204.9
San Francisco	69.7	70.0	69.7	69.2	67.9	63.6	62.0	62.4	65.0	69.4
Regional Total	558.4	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8	547.5

Information

North Bay	9.8	9.1	7.7	7.7	7.4	7.0	6.6	6.8	7.1	7.2
East Bay	31.0	30.4	29.8	29.4	27.8	25.1	23.8	22.7	22.0	21.5
South Bay	53.7	55.3	56.9	56.8	60.2	59.1	61.2	66.8	69.6	82.2
San Francisco	19.5	17.6	18.1	19.4	19.1	19.5	19.2	20.9	23.7	25.3
Regional Total	114.0	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4	136.2

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Financial Activities

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	27.8	27.9	28.0	26.5	24.3	22.8	21.4	22.1	21.8	22.1
East Bay	67.2	70.5	69.0	62.3	56.7	52.6	48.4	47.2	48.4	49.5
South Bay	56.5	57.4	58.4	58.3	54.8	50.5	49.0	50.8	53.3	53.4
San Francisco	57.7	57.5	58.0	59.0	57.7	53.4	51.6	50.3	51.5	48.9
Regional Total	209.2	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0	173.9

Professional & Business Services

North Bay	55.3	55.4	58.8	60.2	59.9	53.9	56.7	53.1	51.2	53.9
East Bay	146.7	150.6	155.0	155.5	161.4	148.5	148.1	154.3	165.0	172.3
South Bay	215.6	218.9	225.0	239.4	242.2	221.9	221.7	232.8	250.7	261.2
San Francisco	100.5	104.8	111.0	117.3	125.1	118.3	120.0	120.7	138.9	154.7
Regional Total	518.1	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8	642.1

Educational & Health Services

North Bay	61.7	62.1	63.0	64.2	66.2	66.4	67.4	67.4	70.0	81.7
East Bay	117.9	118.6	121.9	124.7	127.7	130.0	139.7	137.5	141.1	170.9
South Bay	125.2	127.0	132.2	133.6	139.4	140.2	144.0	151.1	153.0	183.1
San Francisco	53.8	54.6	56.0	57.5	58.1	57.9	58.6	59.0	61.1	85.0
Regional Total	358.6	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2	520.7

Leisure & Hospitality

North Bay	54.0	54.2	54.9	56.3	57.0	54.6	54.2	56.3	59.8	62.7
East Bay	80.6	82.6	85.7	87.5	89.1	85.2	85.6	87.3	92.0	98.0
South Bay	101.6	103.7	107.4	109.7	111.0	106.5	106.8	110.6	117.7	125.6
San Francisco	70.5	71.8	74.0	76.4	78.6	75.7	76.5	78.9	82.7	87.7
Regional Total	306.7	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2	374.0

Other Services

North Bay	17.2	16.8	17.0	17.0	17.4	16.3	16.5	16.3	17.2	17.8
East Bay	37.0	35.8	35.9	36.2	36.0	34.3	34.5	36.0	36.1	37.0
South Bay	36.0	36.1	35.5	36.4	36.8	35.3	36.3	36.1	37.1	38.3
San Francisco	21.0	21.7	21.4	21.9	22.3	21.3	21.5	21.9	22.5	23.9
Regional Total	111.2	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9	117.0

Government

North Bay	78.5	80.5	81.6	82.8	83.4	82.3	76.3	77.7	77.1	78.7
East Bay	178.9	180.0	182.1	186.9	176.6	174.6	167.1	162.5	162.8	163.4
South Bay	128.4	128.0	125.7	126.9	126.6	125.9	121.8	120.1	118.9	119.5
San Francisco	81.6	82.6	83.8	89.2	91.1	89.7	89.3	89.5	88.9	88.6
Regional Total	467.4	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7	450.2

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average

Table 2.2.3

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2004-2013 – ANNUAL PERCENTAGE DISTRIBUTION

This table contains the percentage distribution across the Bay Area of the industry group data from Table 2.2.2.

Total Annual Percentage Distribution

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	15.3	15.3	15.3	15.1	15.0	15.0	14.9	14.6	14.4	14.4
East Bay	31.8	31.9	31.9	31.5	31.0	31.0	30.7	30.6	30.4	30.0
South Bay	37.2	37.1	37.0	37.2	37.4	37.3	37.5	37.9	37.9	37.9
San Francisco	15.7	15.7	15.9	16.2	16.5	16.8	16.9	16.9	17.3	17.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Farm

North Bay	53.1	55.6	62.9	63.6	63.4	64.2	63.2	64.2	65.6	66.5
East Bay	10.2	6.7	7.4	7.8	6.9	7.5	7.9	8.0	7.4	7.5
South Bay	35.0	37.3	28.2	27.7	28.2	26.9	27.9	26.7	25.9	25.0
San Francisco	1.6	0.4	1.5	1.0	1.5	1.5	1.1	1.1	1.1	1.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Natural Resources, Mining & Construction

North Bay	21.1	21.4	20.9	19.8	19.2	18.6	18.7	15.3	14.6	17.9
East Bay	37.5	38.7	38.1	37.8	36.6	38.1	37.0	44.0	43.6	37.1
South Bay	32.5	31.3	32.1	33.0	33.9	32.6	33.5	27.9	29.6	34.8
San Francisco	9.0	8.6	8.9	9.4	10.2	10.6	10.7	12.8	12.1	10.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Manufacturing

North Bay	13.1	13.2	13.2	13.3	13.2	13.4	13.5	13.5	13.8	14.2
East Bay	27.4	27.0	27.5	27.2	27.1	26.3	25.7	25.5	25.8	25.3
South Bay	56.2	56.5	56.1	56.3	56.6	57.4	57.9	58.3	57.7	57.7
San Francisco	3.4	3.3	3.2	3.2	3.1	3.0	2.8	2.8	2.8	2.8
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Trade, Transportation & Utilities

North Bay	16.0	16.0	16.1	16.0	15.9	15.9	16.1	16.2	16.2	16.0
East Bay	34.5	34.7	34.6	34.7	34.7	34.5	34.1	33.9	33.9	33.9
South Bay	37.0	36.8	36.9	37.2	37.4	37.4	37.5	37.7	37.6	37.4
San Francisco	12.5	12.4	12.4	12.1	12.0	12.3	12.2	12.2	12.3	12.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Information

North Bay	8.6	8.1	6.8	6.8	6.5	6.3	6.0	5.8	5.8	5.3
East Bay	27.2	27.0	26.5	25.9	24.3	22.7	21.5	19.4	18.0	15.8
South Bay	47.1	49.2	50.6	50.1	52.6	53.4	55.2	57.0	56.9	60.4
San Francisco	17.1	15.7	16.1	17.1	16.7	17.6	17.3	17.8	19.4	18.6
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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Financial Activities

Sub-Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
North Bay	13.3	13.1	13.1	12.9	12.6	12.7	12.6	13.0	12.5	12.7
East Bay	32.1	33.1	32.3	30.2	29.3	29.3	28.4	27.7	27.7	28.5
South Bay	27.0	26.9	27.4	28.3	28.3	28.2	28.8	29.8	30.5	30.7
San Francisco	27.6	27.0	27.2	28.6	29.8	29.8	30.3	29.5	29.4	28.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Professional & Business Services

North Bay	10.7	10.5	10.7	10.5	10.2	9.9	10.4	9.5	8.5	8.4
East Bay	28.3	28.4	28.2	27.2	27.4	27.4	27.1	27.5	27.2	26.8
South Bay	41.6	41.3	40.9	41.8	41.1	40.9	40.6	41.5	41.4	40.7
San Francisco	19.4	19.8	20.2	20.5	21.3	21.8	22.0	21.5	22.9	24.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Educational & Health Services

North Bay	17.2	17.1	16.9	16.9	16.9	16.8	16.5	16.2	16.5	15.7
East Bay	32.9	32.7	32.7	32.8	32.6	33.0	34.1	33.1	33.2	32.8
South Bay	34.9	35.1	35.4	35.2	35.6	35.5	35.1	36.4	36.0	35.2
San Francisco	15.0	15.1	15.0	15.1	14.8	14.7	14.3	14.2	14.4	16.3
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Leisure & Hospitality

North Bay	17.6	17.4	17.0	17.1	17.0	17.0	16.8	16.9	17.0	16.8
East Bay	26.3	26.4	26.6	26.5	26.5	26.5	26.5	26.2	26.1	26.2
South Bay	33.1	33.2	33.4	33.3	33.1	33.1	33.1	33.2	33.4	33.6
San Francisco	23.0	23.0	23.0	23.2	23.4	23.5	23.7	23.7	23.5	23.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Other Services

North Bay	15.5	15.2	15.5	15.2	15.5	15.2	15.2	14.8	15.2	15.2
East Bay	33.3	32.4	32.7	32.5	32.0	32.0	31.7	32.6	32.0	31.6
South Bay	32.4	32.7	32.3	32.6	32.7	32.9	33.4	32.7	32.9	32.7
San Francisco	18.9	19.7	19.5	19.6	19.8	19.9	19.8	19.9	19.9	20.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Government

North Bay	16.8	17.1	17.2	17.0	17.5	17.4	16.8	17.3	17.2	17.5
East Bay	38.3	38.2	38.5	38.5	37.0	37.0	36.8	36.1	36.4	36.3
South Bay	27.5	27.2	26.6	26.1	26.5	26.6	26.8	26.7	26.6	26.5
San Francisco	17.5	17.5	17.7	18.4	19.1	19.0	19.6	19.9	19.9	19.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average

Table 2.2.4

BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2004-2013 – PERCENTAGE CHANGE

This table contains the annual percentage change in employment by industry group within each sub-region of the Bay Area.

Total Percentage Change

<i>Sub-Region</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
North Bay	0.6	1.0	0.3	-1.1	-6.1	-1.7	-1.2	1.8	7.6
East Bay	1.1	1.2	0.2	-1.8	-6.1	-1.9	0.1	3.0	5.8
South Bay	0.5	1.1	1.9	0.5	-6.3	-0.6	1.8	3.3	7.3
San Francisco	1.1	2.3	3.6	1.8	-4.6	-0.5	0.9	5.8	9.2
Regional Total	0.8	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4	7.2

Farm

North Bay	-7.4	1.6	3.1	-2.3	0.8	-7.0	0.0	3.3	7.3
East Bay	-42.3	0.0	6.7	-12.5	7.1	0.0	0.0	-6.7	7.1
South Bay	-5.6	-32.1	0.0	0.0	-5.3	-1.9	-5.7	-2.0	2.0
San Francisco	-75.0	200.0	-33.3	50.0	0.0	-33.3	0.0	0.0	0.0
Regional Total	-11.4	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1	5.8

Natural Resources, Mining & Construction

North Bay	5.3	-1.4	-6.1	-10.4	-22.3	-8.2	-31.3	0.6	62.9
East Bay	6.8	-0.7	-1.3	-10.6	-16.9	-11.0	-0.4	4.3	13.2
South Bay	-0.2	3.5	2.2	-5.3	-23.0	-6.0	-30.2	11.7	56.1
San Francisco	-1.2	4.8	4.6	0.5	-16.8	0.0	0.0	0.0	11.3
Regional Total	3.5	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.3	33.0

Manufacturing

North Bay	-1.1	-0.4	-1.7	-0.7	-7.7	-1.7	1.2	2.6	2.8
East Bay	-3.7	1.6	-3.3	-0.4	-11.6	-4.7	0.6	1.5	-2.1
South Bay	-1.7	-1.2	-1.5	0.5	-7.8	-1.8	2.4	-0.8	-0.3
San Francisco ¹	-3.3	-5.9	0.0	-2.7	-13.9	-6.5	-1.1	0.0	0.0
Regional Total	-2.2	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.3	-0.4

Trade, Transportation & Utilities

North Bay	0.8	0.6	0.8	-2.1	-7.9	-0.1	1.5	2.4	2.8
East Bay	1.2	0.1	1.4	-1.4	-8.3	-2.9	0.1	2.9	3.6
South Bay	0.3	0.6	2.1	-0.8	-8.2	-1.3	1.2	2.5	3.3
San Francisco	0.4	-0.4	-0.7	-1.9	-6.3	-2.5	0.6	4.2	6.8
Regional Total	0.7	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8	3.7

Information

North Bay	-7.1	-15.4	0.0	-3.9	-5.4	-5.7	3.0	4.4	1.4
East Bay	-1.9	-2.0	-1.3	-5.4	-9.7	-5.2	-4.6	-3.1	-2.3
South Bay	3.0	2.9	-0.2	6.0	-1.8	3.6	9.2	4.2	18.1
San Francisco	-9.7	2.8	7.2	-1.5	2.1	-1.5	8.9	13.4	6.8
Regional Total	-1.4	0.1	0.7	1.1	-3.3	0.1	5.8	4.4	11.3

CONTINUED >

Financial Activities

Sub-Region	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	0.4	0.4	-5.4	-8.3	-6.2	-6.1	3.3	-1.4	1.4
East Bay	4.9	-2.1	-9.7	-9.0	-7.2	-8.0	-2.5	2.5	2.3
South Bay	1.6	1.7	-0.2	-6.0	-7.8	-3.0	3.7	4.9	0.2
San Francisco	-0.3	0.9	1.7	-2.2	-7.5	-3.4	-2.5	2.4	-5.0
Regional Total	2.0	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7	-0.6

Professional & Business Services

North Bay	0.2	6.1	2.4	-0.5	-10.0	5.2	-6.3	-3.6	5.3
East Bay	2.7	2.9	0.3	3.8	-8.0	-0.3	4.2	6.9	4.4
South Bay	1.5	2.8	6.4	1.2	-8.4	-0.1	5.0	7.7	4.2
San Francisco	4.3	5.9	5.7	6.6	-5.4	1.4	0.6	15.1	11.4
Regional Total	2.2	3.8	4.1	2.8	-7.8	0.7	2.6	8.0	6.0

Educational & Health Services

North Bay	0.6	1.4	1.9	3.1	0.3	1.5	0.0	3.9	16.7
East Bay	0.6	2.8	2.3	2.4	1.8	7.5	-1.6	2.6	21.1
South Bay	1.4	4.1	1.1	4.3	0.6	2.7	4.9	1.3	19.7
San Francisco	1.5	2.6	2.7	1.0	-0.3	1.2	0.7	3.6	39.1
Regional Total	1.0	3.0	1.8	3.0	0.8	3.9	1.3	2.5	22.5

Leisure & Hospitality

North Bay	0.4	1.3	2.6	1.2	-4.2	-0.7	3.9	6.2	4.8
East Bay	2.5	3.8	2.1	1.8	-4.4	0.5	2.0	5.4	6.5
South Bay	2.1	3.6	2.1	1.2	-4.1	0.3	3.6	6.4	6.7
San Francisco	1.8	3.1	3.2	2.9	-3.7	1.1	3.1	4.8	6.0
Regional Total	1.8	3.1	2.5	1.8	-4.1	0.3	3.1	5.7	6.2

Other Services

North Bay	-2.3	1.2	0.0	2.4	-6.3	1.2	-1.2	5.5	3.5
East Bay	-3.2	0.3	0.8	-0.6	-4.7	0.6	4.3	0.3	2.5
South Bay	0.3	-1.7	2.5	1.1	-4.1	2.8	-0.6	2.8	3.2
San Francisco	3.3	-1.4	2.3	1.8	-4.5	0.9	1.9	2.7	6.2
Regional Total	-0.7	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4	3.6

Government

North Bay	2.5	1.4	1.5	0.7	-1.3	-7.3	1.8	-0.8	2.1
East Bay	0.6	1.2	2.6	-5.5	-1.1	-4.3	-2.8	0.2	0.4
South Bay	-0.3	-1.8	1.0	-0.2	-0.6	-3.3	-1.4	-1.0	0.5
San Francisco	1.2	1.5	6.4	2.1	-1.5	-0.4	0.2	-0.7	-0.3
Regional Total	0.8	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5	0.6

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average



3.0 Employment

This chapter provides information about the employment trends in San Francisco from 2004 to 2013. The employment data presented in this chapter are based on the payroll jobs in San Francisco provided by the California Employment Development Department (EDD). The data are reported as annual average based on the quarterly average employment data. It is important to note that these employment data differ from the benchmark data provided by EDD on its web site (<http://www.labormarketinfo.edd.ca.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year. The NAICS 814 classification counts private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household as distinct employment “establishments.” These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers.

Employment data are presented by the major economy sectors under each type of land use category. Up until 2000, the C&I organized economic sectors according to the Standard Industrial Classification system (SIC). In 2001, these economic sectors were reorganized according to North American Industry Classification system (NAICS). The NAICS industry classification system is discussed in Section 1.2 – Data Formats. *Tables 1.1 and 1.2* show the NAICS economic sectors.

Employment is defined as number of employees who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. A person holding a job in San Francisco is part of the San Francisco employment pool regardless of his or her place of residence. A person holding more than one job is counted separately for each job. Moreover, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2005 according to the City of San Francisco’s Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city’s ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). Beginning in 2009, numbers are also available for Private Households (Pvt HH). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 – Data Formats.

Employment data reported by land use category will not be consistent with C&I Inventories published before 2001. Public administration jobs have been included in different land use categories in previous C&I Inventories.

This publication includes public administration jobs in the Office land use category for all years; necessary adjustments were made to data from previous years. Public administration jobs were also classified as Office land uses in the 2001 publication. For C&I Inventories 2000 and earlier, public administration jobs were separated from Office, PDR, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 2004 to 2013. Tables 3.2.1 through 3.2.4 show employment data by Industry Group within each Land Use Category in San Francisco from 2004 to 2013. Table 3.3 presents San Francisco employment in its geographic context. It shows employment data by Land Use Category in ten Commerce and Industry Districts in San Francisco in 2013. It also shows Private Household employment as its own land use category. This category represents home-based business establishments and organizations, particularly caregivers. These employees were previously classified under the Cultural/Institutional/Educational land use category. In 2012, Treasure Island was added as a new C&I District.

Table 3.1 (next page)

SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2004-2013

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Employment for an additional land use category, Private Households (Pvt HH), was added in 2009. These jobs were previously counted under CIE. Data is presented from 2009-2013 (see Section 1.2 - Data Formats for a description of land use categories and the NAICS economic sectors). Also included is the percentage distribution in any given year and the annual change within each land use category. The data include graphs below in Figures 3.1.1 (a snapshot of job distribution in 2013) and 3.1.1 (a look at ten-year trends).

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural, Institutional, or Educational
- Pvt HH = Private Household employment
- *Prior to 2008, Households were counted as part of CIE.
- The 12% decline in CIE employment between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009
- From 2003-2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Annual Average Number of Jobs

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	193,180	195,521	206,271	214,661	221,250	211,885	211,050	218,837	231,908	244,262
Retail	95,006	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,305	111,754
PDR	89,037	84,693	81,699	84,986	84,710	76,727	72,967	72,466	75,637	78,234
Hotel	18,090	18,424	19,087	19,070	19,527	17,828	17,568	17,795	17,400	18,136
CIE	127,962	128,726	130,645	135,361	141,848	124,831	126,208	129,015	132,851	156,157
Pvt HH	-	-	-	-	-	19,443	19,819	20,327	22,156	4,113
TOTAL	523,275	523,397	535,996	556,330	570,778	548,992	545,751	559,038	586,257	612,656

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	36.9	37.4	38.5	38.6	38.8	38.6	38.7	39.1	39.6	39.9
Retail	18.2	18.3	18.3	18.4	18.1	17.9	18.0	18.0	18.1	18.2
PDR	17.0	16.2	15.2	15.3	14.8	14.0	13.4	13.0	12.9	12.8
Hotel	3.5	3.5	3.6	3.4	3.4	3.2	3.2	3.2	3.0	3.0
CIE	24.5	24.6	24.4	24.3	24.9	22.7	23.1	23.1	22.7	25.5
Pvt HH	-	-	-	-	-	3.5	3.6	3.6	3.8	0.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	1.2	5.5	4.1	3.1	-4.2	-0.4	3.7	6.0	5.3
Retail	1.1	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7	5.1
PDR	-4.9	-3.5	4.0	-0.3	-9.4	-4.9	-0.7	4.4	3.4
Hotel	1.8	3.6	-0.1	2.4	-8.7	-1.5	1.3	-2.2	4.2
CIE	0.6	1.5	3.6	4.8	-12.0	1.1	2.2	3.0	17.5
Pvt HH	-	-	-	-	-	1.9	2.6	9.0	-81.4
TOTAL	0.0	2.4	3.8	2.6	-3.8	-0.6	2.4	4.9	4.5

Note:

• Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Figure 3.1.1
SAN FRANCISCO EMPLOYMENT BY
LAND USE CATEGORY, 2013



Figure 3.1.2
SAN FRANCISCO EMPLOYMENT BY LAND
USE CATEGORY, 2004-2013

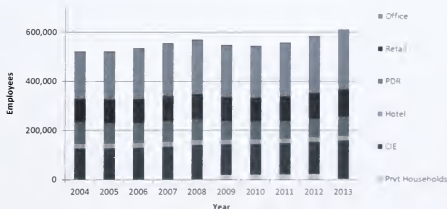


Table & Figure 3.2.1

OFFICE EMPLOYMENT BY INDUSTRY GROUP, 2004-2013

This table presents job trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 3.2.1 presents the job trends graphically.

Annual Average Number of Jobs

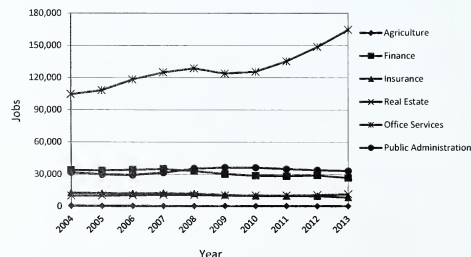
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Agriculture	385	228	241	220	251	330	357	272	184	159
Finance	33,748	33,554	34,239	34,975	33,033	30,313	28,742	28,316	29,048	26,736
Insurance	12,527	12,174	11,962	12,249	12,003	10,799	9,796	9,729	9,512	8,306
Real Estate	9,910	10,033	10,316	10,704	10,739	10,146	10,206	10,126	10,554	11,292
Office Services	104,611	108,312	118,328	124,973	128,754	123,917	125,641	135,363	148,682	164,602
Public Administration	31,635	29,834	29,339	31,490	35,458	36,380	36,308	35,032	33,928	33,166
TOTAL	192,816	194,136	204,425	214,611	220,237	211,885	211,050	218,838	231,908	244,261

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Agriculture	0.2	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.1	0.1
Finance	17.5	17.3	16.7	16.3	15.0	14.3	13.6	12.9	12.5	10.9
Insurance	6.5	6.3	5.9	5.7	5.5	5.1	4.6	4.4	4.1	3.4
Real Estate	5.1	5.2	5.0	5.0	4.9	4.8	4.8	4.6	4.6	4.6
Office Services	54.3	55.8	57.9	58.2	58.5	58.5	59.5	61.9	64.1	67.4
Public Administration	16.4	15.4	14.4	14.7	16.1	17.2	17.2	16.0	14.6	13.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Agriculture	-40.8	5.8	-8.5	13.7	31.7	8.2	-23.8	-32.4	-13.6
Finance	-0.6	2.0	2.1	-5.6	-8.2	-5.2	-1.5	2.6	-8.0
Insurance	-2.8	-1.7	2.4	-2.0	-10.0	-9.3	-0.7	-2.2	-12.7
Real Estate	1.2	2.8	3.8	0.3	-5.5	0.6	-0.8	4.2	7.0
Office Services	3.5	9.2	5.6	3.0	-3.8	1.4	7.7	9.8	10.7
Public Administration	-5.7	-1.7	7.3	12.6	2.6	-0.2	-3.5	-3.2	-2.2
TOTAL	0.7	5.3	5.0	2.6	-3.8	-0.4	3.7	6.0	5.3



Notes:

- Due to rounding, figures may not add to the total shown.
- For years before 2009, sum are less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Agriculture refers to those working in offices whose line of work is related to agriculture.
- Office Services consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical Services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table & Figure 3.2.2
RETAIL EMPLOYMENT BY INDUSTRY GROUP, 2004-2013

This table presents job trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 3.2.2 presents the job trends graphically.

Annual Average Number of Jobs

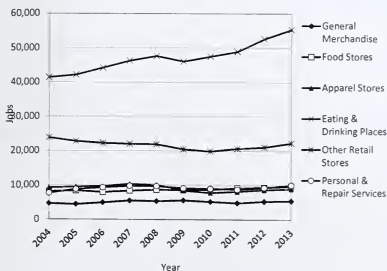
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
General Merchandise	4,662	4,401	4,921	5,486	5,337	5,598	5,219	4,846	5,302	5,457
Food Stores	8,144	8,394	7,940	8,382	8,694	8,575	8,727	9,213	9,349	9,695
Apparel Stores	9,285	9,509	9,698	10,313	10,117	8,434	7,815	8,184	8,687	8,957
Eating & Drinking Places	41,378	42,139	44,183	46,260	47,662	46,049	47,483	48,893	52,600	55,312
Other Retail Stores	23,859	22,794	22,247	22,033	21,926	20,486	19,886	20,678	21,070	22,291
Personal & Repair Services	7,678	8,795	9,306	9,780	9,707	9,136	9,009	8,784	9,298	10,041
TOTAL	95,006	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,306	111,753

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
General Merchandise	4.9	4.6	5.0	5.4	5.2	5.7	5.3	4.8	5.0	4.9
Food Stores	8.6	8.7	8.1	8.2	8.4	8.7	8.9	9.2	8.8	8.7
Apparel Stores	9.8	9.9	9.9	10.1	9.8	8.6	8.0	8.1	8.2	8.0
Eating & Drinking Places	43.6	43.9	44.9	45.2	46.1	46.9	48.4	48.6	49.5	49.5
Other Retail Stores	25.1	23.7	22.6	21.5	21.2	20.8	20.3	20.6	19.8	19.9
Personal & Repair Services	8.1	9.2	9.5	9.6	9.4	9.3	9.2	8.7	8.7	9.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
General Merchandise	-5.6	11.8	11.5	-2.7	4.9	-6.8	-7.1	9.4	2.9
Food Stores	3.1	-5.4	5.6	3.7	-1.4	1.8	5.6	1.5	3.7
Apparel Stores	2.4	2.0	6.3	-1.9	-16.6	-7.3	4.7	6.1	3.1
Eating & Drinking Places	1.8	4.9	4.7	3.0	-3.4	3.1	3.0	7.6	5.2
Other Retail Stores	-4.5	-2.4	-1.0	-0.5	-6.6	-2.9	4.0	1.9	5.8
Personal & Repair Services	14.6	5.8	5.1	-0.7	-5.9	-1.4	-2.5	5.9	8.0
TOTAL	1.1	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7	5.1



Notes:

- Due to rounding, figures may not add to the total shown.
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 3.2.3

PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2004-2013

This table presents job trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 3.2.3 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Construction	17,527	16,615	17,397	19,415	19,630	15,813	14,474	13,860	15,011	15,759
Transportation	21,099	20,222	19,204	19,071	17,484	17,044	16,305	16,052	16,135	16,431
Utilities	10,517	10,503	9,541	7,061	7,837	7,936	7,874	8,364	8,479	8,466
Information	8,226	6,930	6,189	8,350	8,359	7,165	6,565	6,531	6,724	7,176
Wholesale	12,306	12,087	11,729	12,274	12,377	10,943	10,499	10,830	12,015	13,317
Food Manufacturing	2,533	2,572	2,052	1,974	2,008	1,920	1,865	1,867	2,063	2,199
Apparel Manufacturing	4,256	3,387	3,172	2,864	2,426	1,847	1,487	1,513	1,536	1,512
Printing & Publishing	7,804	7,494	7,419	7,738	7,379	8,096	7,687	7,114	7,351	6,849
Other Manufacturing	4,747	4,815	4,921	6,050	5,626	5,963	6,211	6,335	6,323	6,525
TOTAL	89,014	84,623	81,625	84,796	83,125	76,727	72,967	72,466	75,637	78,234

Annual Percentage Distribution

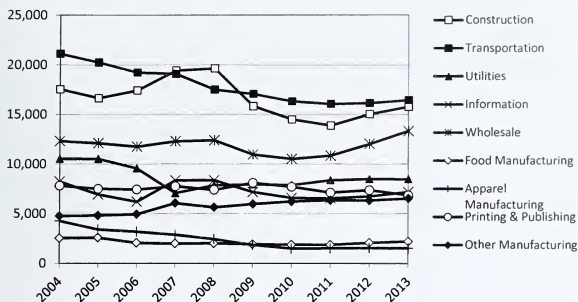
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Construction	19.7	19.6	21.3	22.9	23.6	20.6	19.8	19.1	19.8	20.1
Transportation	23.7	23.9	23.5	22.5	21.0	22.2	22.3	22.2	21.3	21.0
Utilities	11.8	12.4	11.7	8.3	9.4	10.3	10.8	11.5	11.2	10.8
Information	9.2	8.2	7.6	9.8	10.1	9.3	9.0	9.0	8.9	9.2
Wholesale	13.8	14.3	14.4	14.5	14.9	14.3	14.4	14.9	15.9	17.0
Food Manufacturing	2.8	3.0	2.5	2.3	2.4	2.5	2.6	2.6	2.7	2.8
Apparel Manufacturing	4.8	4.0	3.9	3.4	2.9	2.4	2.0	2.1	2.0	1.9
Printing & Publishing	8.8	8.9	9.1	9.1	8.9	10.6	10.5	9.8	9.7	8.8
Other Manufacturing	5.3	5.7	6.0	7.1	6.8	7.8	8.5	8.7	8.4	8.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Construction	-5.2	4.7	11.6	1.1	-19.4	-8.5	-4.2	8.3	5.0
Transportation	-4.2	-5.0	-0.7	-8.3	-2.5	-4.3	-1.6	0.5	1.8
Utilities	-0.1	-9.2	-26.0	11.0	1.3	-0.8	6.2	1.4	-0.2
Information	-15.8	-10.7	34.9	0.1	-14.3	-8.4	-0.5	3.0	6.7
Wholesale	-1.8	-3.0	4.6	0.8	-11.6	-4.1	3.2	10.9	10.8
Food Manufacturing	1.6	-20.2	-3.8	1.7	-4.4	-2.9	0.1	10.5	6.6
Apparel Manufacturing	-20.4	-6.4	-9.7	-15.3	-23.9	-19.5	1.7	1.5	-1.6
Printing & Publishing	-4.0	-1.0	4.3	-4.6	9.7	-5.1	-7.5	3.3	-6.8
Other Manufacturing	1.4	2.2	22.9	-7.0	6.0	4.2	2.0	-0.2	3.2
TOTAL	-4.9	-3.5	3.9	-2.0	-7.7	-4.9	-0.7	4.4	3.4

Figure 3.2.3

PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2004-2013



Notes:

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Instruments, miscellaneous
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table & Figure 3.2.4

CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT BY INDUSTRY GROUP, 2004-2013

This table presents job trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 3.2.4 presents the job trends graphically.

Annual Average Number of Jobs

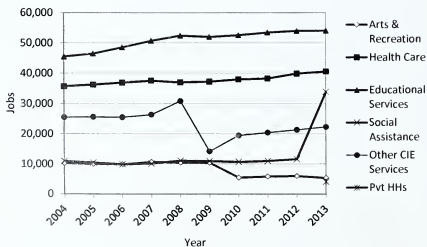
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Art & Recreation	10,253	10,006	9,875	10,645	10,477	10,420	5,491	5,863	5,995	5,388
Health Care	35,720	36,222	36,910	37,530	36,995	37,211	37,999	38,279	39,896	40,575
Educational Services	45,529	46,507	48,539	50,732	52,424	52,022	52,595	53,470	53,996	54,048
Social Assistance	10,964	10,439	9,876	10,138	11,117	10,977	10,690	11,000	11,642	33,860
Other CIE Services	25,495	25,553	25,446	26,316	30,835	14,201	19,433	20,403	21,324	22,286
Pvt HH	-	-	-	-	-	19,443	19,819	20,327	22,156	4,113
TOTAL	127,962	128,726	130,645	135,361	141,848	144,274	146,027	149,342	155,009	160,270

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Art & Recreation	8.0	7.8	7.6	7.9	7.4	7.2	3.8	3.9	3.9	3.4
Health Care	27.9	28.1	28.3	27.7	26.1	25.8	26.0	25.6	25.7	25.3
Educational Services	35.6	36.1	37.2	37.5	37.0	36.1	36.0	35.8	34.8	33.7
Social Assistance	8.6	8.1	7.6	7.5	7.8	7.6	7.3	7.4	7.5	21.1
Other CIE Services	19.9	19.9	19.5	19.4	21.7	9.8	13.3	13.7	13.8	13.9
Pvt HH	-	-	-	-	-	13.5	13.6	13.6	14.3	2.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Art & Recreation	-2.4	-1.3	7.8	-1.6	-0.5	-47.3	6.8	2.3	-10.1
Health Care	1.4	1.9	1.7	-1.4	0.6	2.1	0.7	4.2	1.7
Educational Services	2.1	4.4	4.5	3.3	-0.8	1.1	1.7	1.0	0.1
Social Assistance	-4.8	-5.4	2.6	9.7	-1.3	-2.6	2.9	5.8	190.8
Other CIE Services	0.2	-0.4	3.4	17.2	-53.9	36.8	5.0	4.5	4.5
Pvt HH	-	-	-	-	-	1.9	2.6	9.0	-81.4
TOTAL	0.6	1.5	3.6	4.8	1.7	1.2	2.3	3.8	3.4

**Notes:**

- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private household employment (prior to 2009)
- Pvt HH = Private Household employment
- Prior to 2009, private households were counted as part of Other CIE Services and constituted the majority of Other CIE Services.
- The 54% decline in "Other CIE Services" employment between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the 190% jump in Social Assistance jobs from 2012-2013.
- Due to rounding, figures may not add to the total shown.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 3.3

**EMPLOYMENT BY
COMMERCE & INDUSTRY
DISTRICT AND LAND USE
CATEGORY, 2013**

This table presents the geographic distribution of jobs within San Francisco's eleven Commerce & Industry Districts, by land use category (see Section 1.2 – Data Formats for more on these districts). The Treasure Island District was added this year.

Employment by Land Use Category and C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	2,210	2,585	11,302	8	2,943	34	19,082
Civic Center	14,826	8,860	1,298	4,970	10,203	98	40,255
Financial	130,532	19,612	20,922	6,592	15,168	624	193,450
Mission	3,738	6,912	2,826	30	5,852	184	19,542
North Beach	3,358	7,988	1,810	1,284	4,961	127	19,528
North Central	5,136	11,779	1,374	588	44,048	743	63,668
Northwest	4,210	6,128	2,470	42	14,183	562	27,595
South of Market	59,275	23,161	28,956	3,514	23,161	294	138,361
Southwest	7,438	14,404	4,288	96	25,817	838	52,881
Van Ness	4,241	6,816	784	928	7,465	247	20,481
Treasure Island	85	11	80	0	780	2	958
Unclassified	9,213	3,498	2,124	84	1,576	360	16,855
TOTAL	244,262	111,754	78,234	18,136	156,157	4,113	612,656

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	0.9	2.3	14.4	0.0	1.9	0.8	3.1
Civic Center	6.1	7.9	1.7	27.4	6.5	2.4	6.6
Financial	53.4	17.5	26.7	36.3	9.7	15.2	31.6
Mission	1.5	6.2	3.6	0.2	3.7	4.5	3.2
North Beach	1.4	7.1	2.3	7.1	3.2	3.1	3.2
North Central	2.1	10.5	1.8	3.2	28.2	18.1	10.4
Northwest	1.7	5.5	3.2	0.2	9.1	13.7	4.5
South of Market	24.3	20.7	37.0	19.4	14.8	7.1	22.6
Southwest	3.0	12.9	5.5	0.5	16.5	20.4	8.6
Van Ness	1.7	6.1	1.0	5.1	4.8	6.0	3.3
Treasure Island	0.0	0.0	0.1	0.0	0.5	0.0	0.2
Unclassified	3.8	3.1	2.7	0.5	1.0	8.8	2.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	11.6	13.5	59.2	0.0	15.4	0.2	100.0
Civic Center	36.8	22.0	3.2	12.3	25.3	0.2	100.0
Financial	67.5	10.1	10.8	3.4	7.8	0.3	100.0
Mission	19.1	35.4	14.5	0.2	29.9	0.9	100.0
North Beach	17.2	40.9	9.3	6.6	25.4	0.7	100.0
North Central	8.1	18.5	2.2	0.9	69.2	1.2	100.0
Northwest	15.3	22.2	9.0	0.2	51.4	2.0	100.0
South of Market	42.8	16.7	20.9	2.5	16.7	0.2	100.0
Southwest	14.1	27.2	8.1	0.2	48.8	1.6	100.0
Van Ness	20.7	33.3	3.8	4.5	36.4	1.2	100.0
Treasure Island	8.9	1.1	8.4	0.0	81.4	0.2	100.0
Unclassified	54.7	20.8	12.6	0.5	9.4	2.1	100.0
TOTAL	39.9	18.2	12.8	3.0	25.5	0.7	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2008, Households (NAICS 814) were counted under the CIE land use category; in 2009, they were counted as Other.
- See Map 1.1 for San Francisco C & I district boundaries

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department



4.0 Establishments

This chapter provides information about the number and distribution of establishments in San Francisco. This data is gathered from the California Employment Development Department (EDD).

This chapter reports establishment data by the locations of business, production, or operations. A single company or owner may conduct operations or services at multiple locations; each location is included. The data does not include San Francisco businesses that are exempt from paying local business tax. Government agencies and various non-profit organizations are exempt from local business tax. Businesses that fail to file taxes are also not included.

Establishment data is reported both for the entire city and the city's ten Commerce and Industry Districts by five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). Beginning in 2009, establishment data are also reported for Private Households (Pvt HH). This category includes home-based business establishments and organizations, such as cooks, maids, butlers, private caregivers and outside workers, such as gardeners, caretakers, and other maintenance

workers. These household establishments were previously counted under the CIE land use category. For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats. In addition, some data are reported for a new Commerce and Industry District, Treasure Island.

Table 4.1 shows establishment data by Land Use Category from 2004 to 2013. *Tables 4.2.1* through *4.2.4* show establishment data by Industry Group within each Land Use Category in San Francisco from 2004 to 2013. *Tables 4.3* and *4.4* present San Francisco establishments for 2013 in geographic context. *Table 4.3* shows the distribution of establishments throughout the city by Land Use Category type. *Table 4.4* shows the distribution of establishments throughout the city by employer size.

The tables show a number of establishments for whom the geographical location is not known or which are at the San Francisco International Airport. These have been placed under an Unclassified category. Other establishments that have not registered a physical address with the State and thus cannot be classified under a specific geographic district are also included in this category.

Table 4.1

SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2004-2013

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2004-2013. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2011) and 4.1.2 (a look at ten year trends).

Number of Establishments

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	10,983	10,778	11,280	11,179	11,292	11,419	11,430	11,511	11,938	12,542
Retail	7,651	7,450	7,517	7,395	7,473	7,496	7,541	7,516	7,666	7,947
PDR	4,984	4,826	4,847	4,839	4,812	4,718	4,614	4,483	4,500	4,596
Hotel	329	320	311	291	288	292	299	290	297	305
CIE	18,736	19,254	19,481	20,235	20,710	4,739	4,794	4,844	4,930	25,597
Pvt HH	-	-	-	-	-	22,864	24,161	26,607	26,140	4,184
TOTAL	43,201	42,855	44,190	44,414	48,753	51,528	52,839	55,251	55,471	55,171

Annual Percentage Distribution

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	25.7	25.3	26.0	25.4	25.3	22.2	21.6	20.8	21.5	22.7
Retail	17.9	17.5	17.3	16.8	16.8	14.5	14.3	13.6	13.8	14.4
PDR	11.7	11.3	11.2	11.0	10.8	9.2	8.7	8.1	8.1	8.3
Hotel	0.8	0.8	0.7	0.7	0.6	0.6	0.6	0.5	0.5	0.6
CIE	43.9	45.2	44.8	46.1	46.5	9.2	9.1	8.8	8.9	46.4
Pvt HH	-	-	-	-	-	55.6	45.7	48.2	47.1	7.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	-1.9	4.7	-0.9	1.0	1.1	0.1	0.7	3.7	5.1
Retail	-2.6	0.9	-1.6	1.1	0.3	0.6	-0.3	2.0	3.7
PDR	-3.2	0.4	-0.2	-0.6	-2.0	-2.2	-2.8	0.4	2.1
Hotel	-2.7	-2.8	-6.4	-1.0	1.4	2.4	-3.0	2.4	2.7
CIE	2.8	1.2	3.9	2.3	-77.1	1.2	1.0	1.8	419.2
Pvt HH	-	-	-	-	-	5.7	10.1	-1.8	-84.0
TOTAL	-0.1	1.9	1.2	1.4	15.6	2.5	4.6	0.4	-0.5

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- *The 81% decline in CIE establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009
- Prior to 2009, private households were counted as part of CIE.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Figure 4.1.1a
SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2013

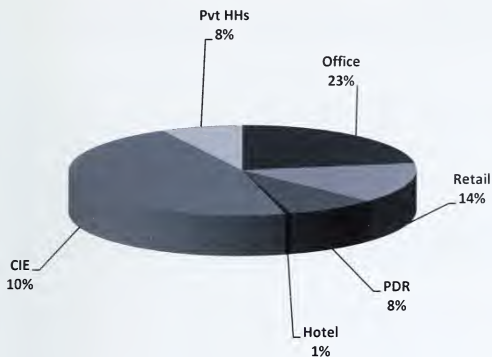


Figure 4.1.1b
SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2004-2013

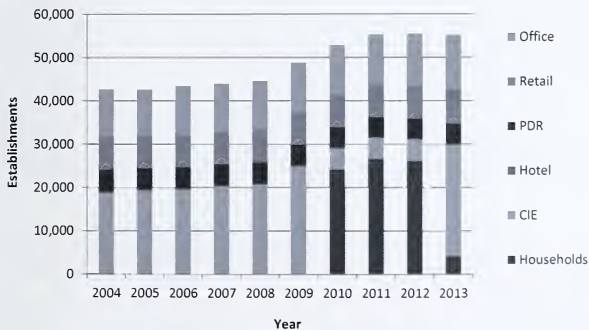


Table & Figure 4.2.1

OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013

This table presents establishment trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 4.2.1 presents the establishment trends graphically.

Number of Establishments

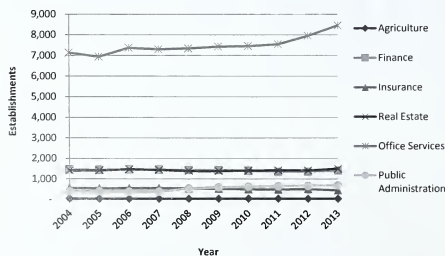
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Agriculture	41	38	37	36	34	39	43	41	38	40
Finance	1,455	1,438	1,464	1,455	1,436	1,434	1,399	1,357	1,353	1,410
Insurance	558	547	552	559	537	525	498	492	508	445
Real Estate	1,404	1,418	1,472	1,443	1,393	1,391	1,412	1,424	1,417	1,506
Office Services	7,132	6,937	7,371	7,297	7,343	7,429	7,456	7,544	7,951	8,454
Public Administration	394	401	380	384	540	601	622	653	671	688
TOTAL	10,983	10,778	11,275	11,173	11,283	11,419	11,430	11,511	11,938	12,543

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Agriculture	0.4	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.3
Finance	13.2	13.3	13.0	13.0	12.7	12.6	12.2	11.8	11.3	11.2
Insurance	5.1	5.1	4.9	5.0	4.8	4.6	4.4	4.3	4.3	3.5
Real Estate	12.8	13.2	13.1	12.9	12.3	12.2	12.4	12.4	11.9	12.0
Office Services	64.9	64.4	65.4	65.3	65.1	65.1	65.2	65.5	66.6	67.4
Public Administration	3.6	3.7	3.4	3.4	4.8	5.3	5.4	5.7	5.6	5.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Agriculture	-7.9	-2.6	-1.4	-6.2	26.5	10.3	-4.7	-7.3	5.3
Finance	-1.2	1.8	-0.6	-1.3	-2.6	-2.4	-3.0	-0.3	4.2
Insurance	-1.9	0.9	1.2	-3.8	-7.3	-5.1	-1.2	3.3	-12.4
Real Estate	1.0	3.8	-2.0	-3.4	1.4	1.5	0.8	-0.5	6.3
Office Services	-2.7	6.3	-1.0	0.6	1.5	0.4	1.2	5.4	6.3
Public Administration	1.8	-5.2	1.2	40.5	15.3	3.5	5.0	2.8	2.5
TOTAL	-1.9	4.6	-0.9	1.0	1.3	0.1	0.7	3.7	5.1

**Notes:**

- Due to rounding, figures may not add to the total shown
- Office Service consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services
- Prior to 2009, sums are less than in Table 4.1 due to increased data suppression warranted by the smaller industrial scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table & Figure 4.2.2

RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013

This table presents establishment trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 4.2.2 presents the establishment trends graphically

Number of Establishments

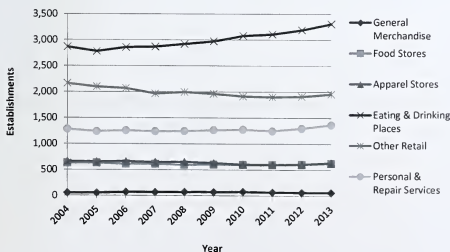
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
General Merchandise	54	55	69	68	71	72	76	67	62	63
Food Stores	626	629	608	612	594	598	597	597	605	624
Apparel Stores	662	654	661	647	650	630	604	598	605	635
Eating & Drinking Places	2,866	2,780	2,858	2,867	2,921	2,972	3,078	3,108	3,189	3,307
Other Retail	2,163	2,097	2,068	1,965	1,995	1,962	1,914	1,900	1,910	1,955
Personal & Repair Services	1,280	1,235	1,255	1,237	1,242	1,262	1,272	1,246	1,296	1,363
TOTAL	7,651	7,450	7,517	7,395	7,473	7,496	7,541	7,516	7,667	7,947

Annual Percentage Distribution

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
General Merchandise	0.7	0.7	0.9	0.9	1.0	1.0	1.0	0.9	0.8	0.8
Food Stores	8.2	8.4	8.1	8.3	7.9	8.0	7.9	7.9	7.9	7.9
Apparel Stores	8.7	8.8	8.8	8.7	8.7	8.4	8.0	8.0	7.9	8.0
Eating & Drinking Places	37.5	37.3	38.0	38.8	39.1	39.6	40.8	41.4	41.6	41.6
Other Retail	28.3	28.2	27.5	26.6	26.7	26.2	25.4	25.3	24.9	24.6
Personal & Repair Services	16.7	16.6	16.7	16.7	16.6	16.8	16.9	16.6	16.9	17.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
General Merchandise	1.9	25.1	-1.1	4.8	7.0	5.6	-11.8	-7.5	1.6
Food Stores	0.6	-3.4	0.6	-2.9	0.6	-0.2	0.0	1.3	3.1
Apparel Stores	-1.2	1.0	-2.2	0.5	-7.1	-4.1	-1.0	1.2	5.0
Eating & Drinking Places	-3.0	2.8	0.3	1.9	5.4	3.6	1.0	2.6	3.7
Other Retail	-3.0	-1.4	-4.9	1.5	-4.1	-2.4	-0.7	0.5	2.4
Personal & Repair Services	-3.5	1.6	-1.4	0.4	2.4	0.8	-2.0	4.0	5.2
TOTAL	-2.6	0.9	-1.6	1.1	0.9	0.6	-0.3	2.0	3.7



Notes:

- Due to rounding, figures may not add to the total shown
- Other Retail Stores include
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.2.3

PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013

This table presents establishment trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 4.2.3 presents the establishment trends graphically.

Number of Establishments

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Construction	1,678	1,647	1,708	1,687	1,676	1,641	1,598	1,538	1,515	1,551
Transportation	517	527	502	494	503	418	417	398	400	408
Utilities	26	26	25	26	25	22	25	31	36	36
Information	202	185	187	249	249	247	240	230	229	228
Wholesale	1,296	1,255	1,293	1,295	1,302	1,253	1,210	1,178	1,196	1,268
Food Manufacturing	160	155	152	147	143	140	144	146	157	161
Apparel Manufacturing	226	206	179	168	163	155	146	141	133	128
Printing & Publishing	406	376	358	358	343	342	328	324	338	318
Other Manufacturing	468	450	446	416	410	500	506	499	495	498
TOTAL	4,978	4,826	4,849	4,839	4,812	4,718	4,614	4,485	4,499	4,596

Annual Percentage Distribution

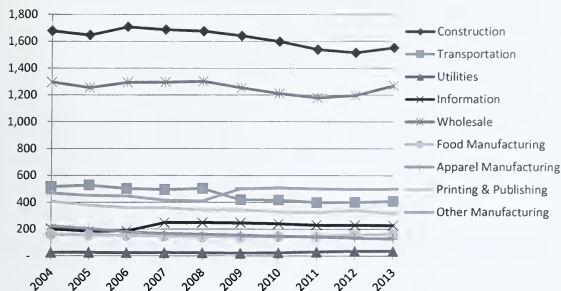
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Construction	33.7	34.1	35.2	34.9	34.8	34.8	34.6	34.3	33.7	33.7
Transportation	10.4	10.9	10.3	10.2	10.4	8.9	9.0	8.9	8.9	8.9
Utilities	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.7	0.8	0.8
Information	4.0	3.8	3.9	5.1	5.2	5.2	5.2	5.1	5.1	5.0
Wholesale	26.0	26.0	26.7	26.8	27.1	26.6	26.2	26.3	26.6	27.6
Food Manufacturing	3.2	3.2	3.1	3.0	3.0	3.0	3.1	3.3	3.5	3.5
Apparel Manufacturing	4.5	4.3	3.7	3.5	3.4	3.3	3.2	3.1	3.0	2.8
Printing & Publishing	8.2	7.8	7.4	7.4	7.1	7.2	7.1	7.2	7.5	6.9
Other Manufacturing	9.4	9.3	9.2	8.6	8.5	10.6	11.0	11.1	11.0	10.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Construction	-1.8	3.7	-1.2	-0.6	-4.6	-2.6	-3.8	-1.5	2.4
Transportation	2.0	-4.8	-1.5	1.7	-17.0	-0.2	-4.6	0.5	2.0
Utilities	1.0	-4.8	3.0	-2.9	0.0	13.6	24.0	16.1	0.0
Information	-8.2	1.1	33.2	-0.2	-3.4	-2.8	-4.2	-0.4	-0.4
Wholesale	-3.2	3.1	0.2	0.5	-7.0	-3.4	-2.6	1.5	6.0
Food Manufacturing	-3.1	-2.1	-3.1	-3.2	1.1	2.9	1.4	7.5	2.5
Apparel Manufacturing	-9.2	-12.9	-6.3	-3.1	-10.2	-5.8	-3.4	-5.7	-3.8
Printing & Publishing	-7.5	-4.7	0.1	-4.3	-4.4	-4.1	-1.2	4.3	-5.9
Other Manufacturing	-3.7	-0.9	-6.8	-1.3	23.4	1.2	-1.4	-0.8	0.6
TOTAL	-3.1	0.5	-0.2	-0.6	-4.1	-2.2	-2.8	0.3	2.2

Figure 4.2.3

PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013



Notes:

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Instruments, miscellaneous
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.2.4

CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) AND PRIVATE HOUSEHOLD (Pvt HH) ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013

This table presents establishment trends in the cultural/institutional/educational (CIE) and in the private household (Pvt HH) land use categories. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 4.2.4 presents the establishment trends graphically.

Number of Establishments

Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Arts & Recreation	405	402	424	424	416	416	246	249	253	265
Health Care	2,066	2,025	2,086	2,075	2,055	2,071	2,111	2,113	2,120	2,152
Educational Services	910	699	699	694	697	703	705	714	726	906
Social Assistance	595	586	574	590	600	623	628	655	677	21,082
Other CIE Services	15,209	15,706	16,389	16,684	21,122	926	1,104	1,112	1,154	1,192
Pvt HH	-	-	-	-	-	22,864	24,161	26,607	26,140	4,183
TOTAL	19,185	19,418	20,172	20,466	24,888	27,603	28,955	31,450	31,070	29,780

Annual Percentage Distribution

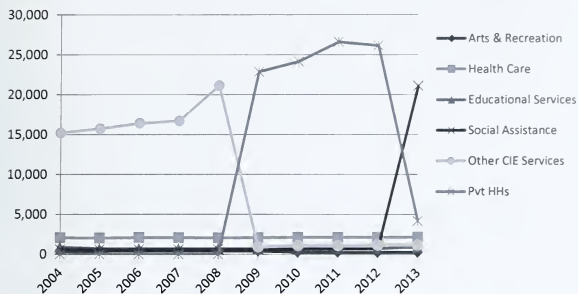
Industry Group	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Arts & Recreation	2.1	2.1	2.1	2.1	1.7	1.5	0.8	0.8	0.8	0.9
Health Care	10.8	10.4	10.3	10.1	8.3	7.5	7.3	6.7	6.8	7.2
Educational Services	4.7	3.6	3.5	3.4	2.8	2.5	2.4	2.3	2.3	3.0
Social Assistance	3.1	3.0	2.8	2.9	2.4	2.3	2.2	2.1	2.2	70.8
Other CIE Services	79.3	80.9	81.2	81.5	84.9	3.4	3.8	3.5	3.7	4.0
Pvt HH	-	-	-	-	-	82.8	83.4	84.6	84.1	14.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Arts & Recreation	-0.7	5.5	-0.1	-1.8	0.0	-40.8	1.2	1.6	4.7
Health Care	-2.0	3.0	-0.6	-1.0	0.8	1.9	0.1	0.3	1.5
Educational Services	-23.2	0.0	-0.7	0.4	0.9	0.3	1.3	1.7	24.8
Social Assistance	-1.4	-2.1	2.8	1.6	3.9	0.8	4.3	3.4	3,014.0
Other CIE Services	3.3	4.4	1.8	26.6	-95.6	19.2	0.7	3.8	3.3
Pvt HH	-	-	-	-	-	5.7	10.1	-1.8	-84.0
TOTAL	1.2	3.9	1.5	21.6	10.9	4.9	8.6	-1.2	-4.2

Figure 4.2.4

CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2004-2013



Notes:

- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private household employment (prior to 2009)
- Pvt HH = Private Household employment
- The 95.6% decline in Other CIE Services establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the large jump in Social Assistance establishments from 2012-2013.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.3
ESTABLISHMENTS BY
COMMERCE & INDUSTRY
DISTRICT AND LAND USE
CATEGORY, 2013

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts by land use category (see Section 1.2 – Data Formats for more on these Districts).

Number of Establishments

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pot HH</i>	<i>Total</i>
Bayview	165	232	614	2	1,378	44	2,435
Civic Center	900	486	100	67	2,110	110	3,773
Financial	4,963	1,215	718	48	1,912	559	9,415
Mission	476	590	287	8	1,593	208	3,162
North Beach	402	512	137	26	1,716	129	2,922
North Central	872	964	230	44	2,644	724	5,478
Northwest	571	564	276	6	2,242	509	4,168
South of Market	1,882	1,203	1,063	40	2,751	329	7,268
Southwest	1,332	1,458	867	20	7,122	1,034	11,833
Van Ness	524	532	101	39	1,815	213	3,224
Treasure Island	7	3	6	0	58	2	76
Unclassified	448	188	197	5	256	323	1,417
TOTAL	12,542	7,947	4,596	305	25,597	4,184	55,171

Percentage Distribution by Commerce and Industry District

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pot HH</i>	<i>Total</i>
Bayview	1.3	2.9	13.4	0.7	5.4	1.1	4.4
Civic Center	7.2	6.1	2.2	22.0	8.2	2.6	6.8
Financial	39.6	15.3	15.6	15.7	7.5	13.4	17.1
Mission	3.8	7.4	6.2	2.6	6.2	5.0	5.7
North Beach	3.2	6.4	3.0	8.5	6.7	3.1	5.3
North Central	7.0	12.1	5.0	14.4	10.3	17.3	9.9
Northwest	4.6	7.1	6.0	2.0	8.8	12.2	7.6
South of Market	15.0	15.1	23.1	13.1	10.7	7.9	13.2
Southwest	10.6	18.3	18.9	6.6	27.8	24.7	21.4
Van Ness	4.2	6.7	2.2	12.8	7.1	5.1	5.8
Treasure Island	0.1	0.0	0.1	0.0	0.2	0.0	0.1
Unclassified	3.6	2.4	4.3	1.6	1.0	7.7	2.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

<i>C&I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pot HH</i>	<i>Total</i>
Bayview	6.8	9.5	25.2	0.1	56.6	1.8	100.0
Civic Center	23.9	12.9	2.7	1.8	55.9	2.9	100.0
Financial	52.7	12.9	7.6	0.5	20.3	5.9	100.0
Mission	15.1	18.7	9.1	0.3	50.4	6.6	100.0
North Beach	13.8	17.5	4.7	0.9	58.7	4.4	100.0
North Central	15.9	17.6	4.2	0.8	48.3	13.2	100.0
Northwest	13.7	13.5	6.6	0.1	53.8	12.2	100.0
South of Market	25.9	16.6	14.6	0.6	37.9	4.5	100.0
Southwest	11.3	12.3	7.3	0.2	60.2	8.7	100.0
Van Ness	16.3	16.5	3.1	1.2	56.3	6.6	100.0
Treasure Island	9.2	3.9	7.9	0.0	76.3	2.6	100.0
Unclassified	31.6	13.3	13.9	0.4	18.1	22.8	100.0
TOTAL	22.7	14.4	8.3	0.6	46.4	7.6	100.0

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment
- Prior to 2008, Private households (NAICS 814) were counted under the CIE land use category.
- Tables 4.2-1-4.2.4 provide detailed information of various components of Office, Retail, PDR and CIE respectively.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

Table 4.4
ESTABLISHMENTS BY
COMMERCE & INDUSTRY
DISTRICT AND SIZE CLASS,
2013

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Section 1.2 – Data Formats for more on these Districts).

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1,793	244	204	131	34	27	1	0	1	2,435
Civic Center	2,744	388	285	227	66	40	14	6	3	3,773
Financial	5,156	1,510	1,090	917	380	250	67	30	15	9,415
Mission	2,359	374	238	126	45	16	3	1	0	3,162
North Beach	2,272	264	190	126	40	23	6	1	0	2,922
North Central	4,215	550	371	236	64	30	3	3	6	5,478
Northwest	3,341	390	252	124	27	20	10	2	2	4,168
South of Market	4,647	909	785	532	200	124	42	15	14	7,268
Southwest	9,795	964	608	332	87	36	8	2	1	11,833
Van Ness	2,544	297	194	126	34	23	4	1	1	3,224
Treasure Island	62	4	6	2	0	1	1	0	0	76
Unclassified	998	175	113	82	27	17	3	2	0	1,417
TOTAL	39,924	6,069	4,336	2,961	1,004	607	162	63	43	55,171

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	4.5	4.0	4.7	4.4	3.4	4.4	0.6	0.0	2.3	4.4
Civic Center	6.9	6.4	6.6	7.7	6.6	6.6	8.6	9.5	7.0	6.8
Financial	12.9	24.9	25.1	31.0	37.8	41.2	41.4	47.6	34.9	17.1
Mission	5.9	6.2	5.5	4.3	4.5	2.6	1.9	1.6	0.0	5.7
North Beach	5.7	4.3	4.4	4.3	4.0	3.8	3.7	1.6	0.0	5.3
North Central	10.6	9.1	8.6	8.0	6.4	4.9	1.9	4.8	14.0	9.9
Northwest	8.4	6.4	5.8	4.2	2.7	3.3	6.2	3.2	4.7	7.6
South of Market	11.6	15.0	18.1	18.0	19.9	20.4	25.9	23.8	32.6	13.2
Southwest	24.5	15.9	14.0	11.2	8.7	5.9	4.9	3.2	2.3	21.4
Van Ness	6.4	4.9	4.5	4.3	3.4	3.8	2.5	1.6	2.3	5.8
Treasure Island	0.2	0.1	0.1	0.1	0.0	0.2	0.6	0.0	0.0	0.1
Unclassified	2.5	2.9	2.6	2.8	2.7	2.8	1.9	3.2	0.0	2.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	73.6	10.0	8.4	5.4	1.4	1.1	0.0	0.0	0.0	100.0
Civic Center	72.7	10.3	7.6	6.0	1.7	1.1	0.4	0.2	0.1	100.0
Financial	54.8	16.0	11.6	9.7	4.0	2.7	0.7	0.3	0.2	100.0
Mission	74.6	11.8	7.5	4.0	1.4	0.5	0.1	0.0	0.0	100.0
North Beach	77.8	9.0	6.5	4.3	1.4	0.8	0.2	0.0	0.0	100.0
North Central	76.9	10.0	6.8	4.3	1.2	0.5	0.1	0.1	0.1	100.0
Northwest	80.2	9.4	6.0	3.0	0.6	0.5	0.2	0.0	0.0	100.0
South of Market	63.9	12.5	10.8	7.3	2.8	1.7	0.6	0.2	0.2	100.0
Southwest	82.8	8.1	5.1	2.8	0.7	0.3	0.1	0.0	0.0	100.0
Van Ness	78.9	9.2	6.0	3.9	1.1	0.7	0.1	0.0	0.0	100.0
Treasure Island	81.6	5.3	7.9	2.6	0.0	1.3	1.3	0.0	0.0	100.0
Unclassified	70.4	12.4	8.0	5.8	1.9	1.2	0.2	0.1	0.0	100.0
TOTAL	72.4	11.0	7.9	5.4	1.8	1.1	0.3	0.1	0.1	100.0

Notes:

- Due to rounding, figures may not add to the total shown.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department



5.0 Monetary Transactions

This chapter presents information about trends in monetary transactions that occur in San Francisco. While the Employment and Establishments chapters provide information regarding the quantity and growth of jobs and establishments in San Francisco, this chapter supplies complementary information regarding the city's economic health in monetary terms. The chapter is divided into three sections, each relating to a key source of revenue in the city's economy such as annual wages, retail sales and permits, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 2004 to 2013, using data supplied by the California Employment Development Department (EDD). Section 5.2 presents the State Board of Equalization's data on San Francisco's taxable retail sales and sales tax permits in 2013. Section 5.3 reports city government revenues and expenditures in fiscal year 2013 (July 1, 2012 to June 30, 2013). This data is obtained from the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

Nominal or current dollars reported for a specified period of time have been adjusted for inflation to obtain constant dollars. The adjustments have been made to control for inflated monetary values, thus enabling better measurement of an indicator's economic performance over time. The adjustments have been made by dividing nominal or current values by the Consumer Price Index (CPI) provided by the United States Department of Labor, Bureau of Labor Statistics.

5.1 WAGES BY LAND USE CATEGORY

This section describes total annual earnings received by persons for work in San Francisco from 2004 to 2013. Persons who received wages include workers who commute into the city and San Francisco residents employed in the city. The California Employment Development Department (EDD) prepares the measure of total annual wages. It includes each employee's total wages as reported by businesses in their payroll records. The earnings of sole proprietors are not reported in these data. Total annual wages are presented in thousands of dollars, annual percentage distribution, and percentage change.

This section complements Chapter 3, Employment. The employment and wages data in this inventory are derived from the same source, and are organized by Land Use Category. For an explanation of the Land Use Categories and C&I Districts, refer to Section 1.2, Data Formats.

5.2 TAXABLE SALES AND PERMITS

Section 5.2 reports taxable sales in retail stores and the number of sales tax permits issued for retail stores located in San Francisco from 2004-2013. Taxable sales and permits in California are reported by the California State Board of Equalization (SBE). Taxable sales revenues and sales tax permits issued for outlets that are not retail stores, including business and personal services, have not been included. Such outlets include the following: non-store retailers (vending machines, sales by telephone), public utilities, government agencies, educational institutions, health services, and advertising agencies.

Taxable sales are measured by transactions subject to sales and use tax, and are reported quarterly by type of business for all cities and counties in California.

Businesses are classified by the SBE according to their principal line of merchandise or service. Taxable sales are reported by type of business, but cannot be broken down by commodity. Those data do not include sales that are not subject to sales or use tax, such as food for home consumption, prescription medicine, sales for resale, and taxable sales disclosed by board audits.

The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property, except those dealing in non-taxable commodities. Permits are tabulated semi-annually on January 1 and July 1.

5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2012-2013. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data covers the general fund, special revenue funds, and debt service funds. *Table 5.3.1* describes general governmental revenues by source. *Table 5.3.2* describes general governmental expenditures by major function.

The general fund accounts for resources that are not required to be accounted for in other funds. Special revenue funds are used to account for the proceeds of a specific revenue source, other than expendable trusts or major capital projects, which are legally restricted to expenditures for specified purposes. Now included in the general fund are two major funds/activities that were previously accounted for in special revenue funds: hotel tax and work order funds. All other previous special revenue funds remain in the new fund structure as special revenue funds. The debt service funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal on general obligation and lease revenue bonds and related authorized costs. There are no changes in the fund structure of this fund type.

Other city funds not included are capital project funds, proprietary fund types, and fiduciary fund types. Proprietary funds consist of enterprise and internal service funds. Fiduciary funds consist of pension trust, non-expendable trust funds, and expendable trust funds.

Table 5.3.1 general governmental revenues are presented by major source while *Table 5.3.2* presents them by government function for fiscal year 2012-2013. Major revenue sources are property taxes; business taxes; other local taxes; licenses, fines and penalties; interest and investment income; rents and concessions; intergovernmental; and charges for services. The major functions of general governmental expenditures include public protection; public works, transportation, and commerce; human welfare and neighborhood development; community health; culture and recreation; general administration and finance; debt service; and capital outlay.

Table 5.1.1 (next page)

TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2004-2013

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 2004-2013, (see Section 1.2 - Data Formats for a description of land use categories and discussion of NAICS categories). Also included is the percentage distribution in each year and the annual change within each land use category. The data are also presented graphically below in Figures 5.1.1a (a snapshot of job distribution in 2013) and 5.1.1b (a look at ten-year trends).

Notes:

- Totals from 2004-2013 also include wages from some unclassified land uses.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2009, Private Households were counted under the CIE land use category.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department
- CPS-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics

Nominal - Non-Adjusted for Inflation (\$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$17,619,077	\$19,229,061	\$22,250,471	\$24,711,750	\$25,544,356	\$23,203,283	\$24,028,220	\$26,733,245	\$28,914,202	\$31,429,114
Retail	\$2,664,799	\$2,841,746	\$2,942,479	\$3,210,333	\$3,233,372	\$3,020,532	\$3,139,383	\$3,333,231	\$3,682,752	\$3,915,844
PDR	\$5,550,080	\$5,550,920	\$5,753,421	\$6,340,182	\$6,319,130	\$5,897,953	\$5,868,508	\$6,007,279	\$6,852,515	\$7,137,839
Hotel	\$584,876	\$613,242	\$671,000	\$704,872	\$764,622	\$695,174	\$691,582	\$736,805	\$740,550	\$803,545
CIE	\$5,558,781	\$5,911,782	\$6,380,066	\$6,817,418	\$7,325,473	\$7,249,460	\$7,541,484	\$7,858,454	\$8,406,144	\$8,999,560
Pvt HH	--	--	--	--	--	\$375,303	\$314,522	\$288,029	\$293,476	\$75,279
TOTAL	\$31,977,613	\$34,149,207	\$37,998,504	\$41,805,696	\$43,316,200	\$40,441,705	\$41,667,560	\$45,112,659	\$48,993,364	\$52,480,447

Inflation-Adjusted (2013 \$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$21,715,690	\$23,244,017	\$26,060,599	\$28,025,935	\$28,096,418	\$25,336,295	\$25,882,501	\$28,066,726	\$29,582,464	\$31,429,114
Retail	\$3,284,392	\$3,435,092	\$3,446,344	\$3,640,882	\$3,556,409	\$3,298,201	\$3,381,852	\$3,499,371	\$3,720,334	\$3,915,844
PDR	\$6,840,530	\$6,709,932	\$6,738,626	\$7,190,487	\$6,950,456	\$6,440,135	\$6,321,387	\$6,306,703	\$7,006,150	\$7,137,839
Hotel	\$720,866	\$741,285	\$785,901	\$799,405	\$841,013	\$759,079	\$744,952	\$773,530	\$757,153	\$803,545
CIE	\$6,851,254	\$7,145,140	\$7,472,577	\$7,731,727	\$8,057,340	\$7,915,882	\$8,123,468	\$8,250,148	\$8,594,611	\$8,999,560
Pvt HH	--	--	--	--	--	\$409,804	\$338,794	\$302,385	\$300,056	\$75,279
TOTAL	\$39,412,730	\$41,279,433	\$44,505,294	\$47,412,414	\$47,643,795	\$44,159,397	\$44,883,085	\$47,361,237	\$50,091,805	\$52,480,447

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	55.1	56.3	58.6	59.1	59.0	57.4	57.7	59.3	59.0	59.9
Retail	8.3	8.3	7.7	7.7	7.5	7.5	7.5	7.4	7.4	7.5
PDR	17.4	16.3	15.1	15.2	14.6	14.6	14.1	13.3	14.0	13.6
Hotel	1.8	1.8	1.8	1.7	1.8	1.7	1.7	1.6	1.5	1.5
CIE	17.4	17.3	16.8	16.3	16.9	17.9	18.1	17.4	17.2	17.1
Pvt HH	--	--	--	--	--	0.9	0.8	0.6	0.6	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	7.0	12.1	7.5	0.3	-9.8	2.2	8.4	5.3	6.3
Retail	4.6	0.3	5.6	-2.3	-7.3	2.5	3.5	6.3	5.3
PDR	-1.9	0.4	6.7	-3.3	-7.3	-1.8	-0.2	11.1	1.9
Hotel	2.8	6.0	1.7	5.2	-9.7	-1.9	3.8	-2.1	6.1
CIE	4.3	4.6	3.5	4.2	-1.8	2.6	1.6	4.2	4.7
Pvt HH	--	--	--	--	--	-17.3	-10.7	-0.8	-74.9
TOTAL	4.7	7.8	6.5	0.5	-7.3	1.6	5.5	5.8	4.8

Figure 5.1.1a
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2013

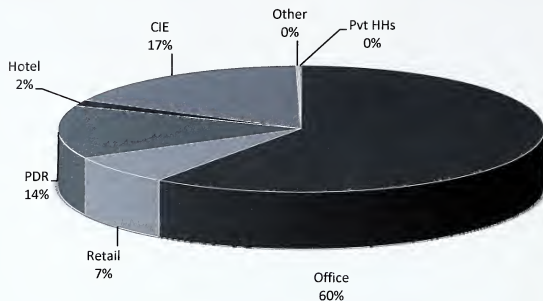


Figure 5.1.1b
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2004-2013

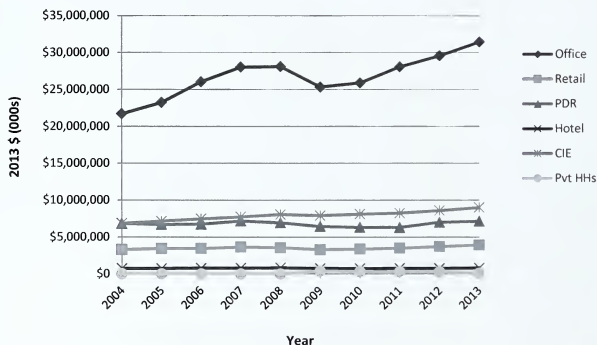


Table & Figure 5.1.2
ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 2004-2013

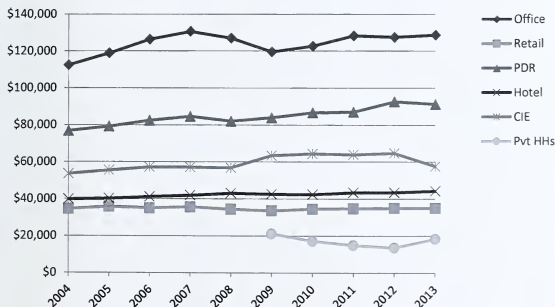
This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.2.

Wages per Worker (2013 \$)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$112,412	\$118,882	\$126,342	\$130,559	\$126,989	\$119,576	\$122,637	\$128,249	\$127,475	\$128,670
Retail	\$34,570	\$35,770	\$35,062	\$35,607	\$34,380	\$33,560	\$34,458	\$34,786	\$34,997	\$35,040
PDR	\$76,828	\$79,227	\$82,481	\$84,608	\$82,050	\$83,936	\$86,634	\$87,030	\$92,629	\$91,237
Hotel	\$39,849	\$40,235	\$41,175	\$41,919	\$43,069	\$42,578	\$42,404	\$43,469	\$43,515	\$44,307
CIE	\$53,541	\$55,514	\$57,198	\$57,119	\$56,803	\$63,413	\$64,366	\$63,947	\$64,694	\$57,631
Pvt HH	-	-	-	-	-	\$21,077	\$17,094	\$14,876	\$13,543	\$18,303
Average	\$75,319	\$78,868	\$83,033	\$85,224	\$83,472	\$83,391	\$85,340	\$87,916	\$85,443	\$85,661

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	5.8	6.3	3.3	-2.7	-5.8	2.6	4.6	-0.6	0.9
Retail	3.5	-2.0	1.6	-3.4	-2.4	2.7	1.0	0.6	0.1
PDR	3.1	4.1	2.6	-3.0	2.3	3.2	0.5	6.4	-1.5
Hotel	1.0	2.3	1.8	2.7	-1.1	-0.4	2.5	0.1	1.8
CIE	3.7	3.0	-0.1	-0.6	11.6	1.5	-0.7	1.2	-10.9
Pvt HH	-	-	-	-	-	-18.9	-13.0	-9.0	35.1
TOTAL	4.7	5.3	2.6	-2.1	-0.1	2.3	3.0	-2.8	0.3



Note: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment
 Sources: Employees from Table 3.1 of this report; Wages from Table 5.1.1 of this report

Table 5.2.1

This is a table of taxable sales in San Francisco for the last ten years. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

Nominal - Non-Adjusted for Inflation (\$ 000s)

Type of Sales	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
All Retail Sales	\$8,414,781	\$9,049,788	\$9,588,520	\$10,006,572	\$9,804,636	\$8,511,146	\$8,971,759	\$9,939,895	\$10,883,271	\$13,069,501
All Outlets	\$12,207,507	\$13,025,974	\$13,892,188	\$14,614,736	\$14,837,689	\$12,633,575	\$13,443,121	\$14,890,527	\$15,953,605	\$18,497,595

Inflation-Adjusted (2013 \$ 000s)

Type of Sales	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
All Retail Sales	\$10,371,302	\$10,939,350	\$11,230,439	\$11,348,591	\$10,784,189	\$9,293,552	\$9,664,118	\$10,435,335	\$11,127,276	\$13,069,501
All Outlets	\$15,045,875	\$15,745,749	\$16,271,059	\$16,574,773	\$16,320,079	\$13,794,944	\$14,480,540	\$15,632,725	\$16,311,288	\$18,497,595

Percentage Change

Type of Sales	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
All Retail Sales	5.5%	2.7%	1.1%	-5.0%	-13.8%	4.0%	8.0%	6.6%	17.5%
All Outlets	4.7%	3.3%	1.9%	-1.5%	-15.5%	5.0%	8.0%	4.3%	13.4%

Sources:

- California State Board of Equalization, Taxable Sales in California
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

Figure 5.2.1
TAXABLE RETAIL SALES AND ALL OUTLET SALES, 2004-2013 (2013 \$000s)

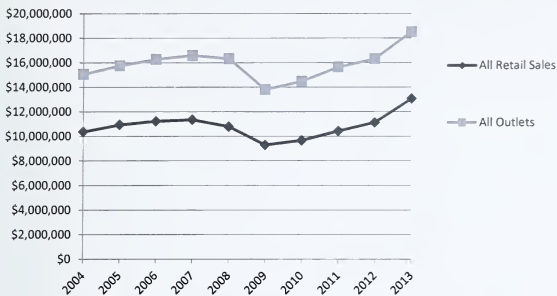


Table 5.2.2
TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2013

This table looks more closely at the type of retail sales that occurred in 2013, as well as the number of sales permits issued in that time.

Type of Retail Sales	Sales Tax Permits	Taxable Sales Transactions (\$ 000s)
Apparel Stores	2,325	\$2,097,712
General Merchandise	259	\$917,387
Food Stores	1,206	\$731,991
Eating & Drinking	4,539	\$3,731,375
Home Furnishings & Appliances	1,013	\$872,937
Building Materials	309	\$532,930
Service Stations	116	\$660,193
Automotive Dealers and Supplies	207	\$545,745
Other Retail Stores	8,657	\$1,853,748
TOTAL RETAIL STORES	18,224	\$13,069,501
TOTAL OUTLETS	27,367	\$18,497,595

Notes:

- Other Retail Stores include
 - Packaged liquor stores
 - Second hand merchandise
 - Farm and garden supply stores
 - Fuel and ice dealers
 - Mobile homes, trailers and campers
 - Boat, motorcycle, and plane dealers
 - Specialty store group
- In other derivations of BOE data all other retail stores includes farm implements

Sources:

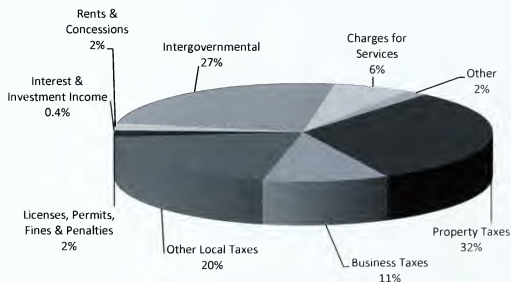
- California State Board of Equalization, Taxable Sales in California
- Additional calculations by the San Francisco Planning Department

Table & Figure 5.3.1

SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2013

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2013. This data is shown graphically in Figure 5.3.1.

<i>Revenue Source</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Property Taxes	\$1,421,764	31.6
Business Taxes	\$480,131	10.7
Other Local Taxes	\$898,486	20.0
Licenses, Permits, Fines & Penalties	\$90,742	2.0
Interest & Investment Income	\$7,489	0.2
Rents & Concessions	\$98,770	2.2
Intergovernmental	\$1,118,705	24.9
Federal -	\$420,775	9.4
State -	\$656,141	14.6
Other -	\$41,789	0.9
Charges for Services	\$296,059	6.6
Other	\$81,014	1.8
TOTAL	\$4,493,160	100.0



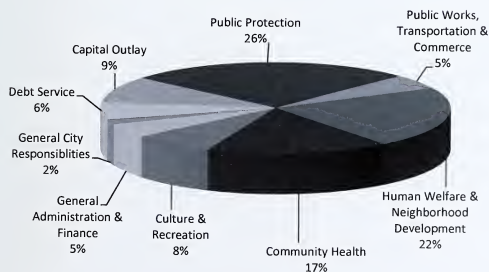
Note: Fiscal Year 2013 runs from July 1, 2012 to June 30, 2013

Source: San Francisco Controller, Comprehensive Annual Financial Report.

Table & Figure 5.3.2**SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2013**

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2013. This data is shown graphically in Figure 5.3.2.

<i>Expenditure Function</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Public Protection	\$1,145,884	26.4
Public Works, Transportation & Commerce	\$223,218	5.1
Human Welfare & Neighborhood Development	\$945,106	21.7
Community Health	\$734,736	16.9
Culture & Recreation	\$328,794	7.6
General Administration & Finance	\$211,138	4.9
General City Responsibilities	\$81,775	1.9
Debt Service	\$265,644	6.1
Capital Outlay	\$410,994	9.5
TOTAL	\$4,347,289	100.00



Note: Fiscal Year 2013 runs from July 1, 2012 to June 30, 2013.

Source: San Francisco Controller, Comprehensive Annual Financial Report.



6.0 Building and Land Use

The tables and graphs in this chapter present information about building permit applications for 2004 through 2013, as well as land use data for 2013. Building permit applications are filed at the City and County of San Francisco Department of Building Inspection (DBI) for construction of new buildings, demolitions, and alterations to existing structures. The number of permits, status of applications, and cost of projects are measures of construction activity in San Francisco, which accounts for approximately 20% of employment annually over the past 10 years. All information for this section was provided by DBI and has been reviewed and tabulated by Planning Department staff.

6.1 BUILDING

The discussion of building in San Francisco is presented in five sub-sections, 6.1 through 6.5 as follows: (1) All Permits & Costs by Land Use District (10 years); (2) All Permits & Costs by C&I District (10 years); (3) All Permits & Costs by C&I District and Land Use Categories (current year); (4) Permit Status by C&I District and Land Use Categories (current year); (5) Total Office Space (10 years).

Sections 6.1 and 6.2. Data are reported by the year that a project was filed with the Department of Building Inspection. Although all filed applications may not ultimately lead to completed projects, trends in the number of building permit applications filed are an important economic indicator. Construction activity and spending is a gauge of business confidence. Economic health is measured, among other things, by housing starts. Residential construction often leads commercial activity by about a year. Construction activity and its attendant costs generate jobs and wages, which in turn stimulate spending and consumption throughout the local economy.

In Section 6.1, data are reported by Land Use Category; in Section 6.2, these data are reported by Commerce and Industry (C&I) District. For further information on Land Use Categories and C&I Districts, refer to the Data Formats section in Appendix Chapter 1.

Tables in these sections are subdivided into three groups: (1) all building permits, (2) building permits for new construction activity, and (3) building permits for alterations and demolitions. In turn, each group contains tables that report information on permits, total construction cost, and average construction cost by year, land use and C&I District. Annual percentage distributions and annual percentage changes are reported for numbers of permit applications and total construction costs. Construction cost values are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 2013 is designated as the base year.

Section 6.3. Permit and construction cost data are cross-tabulated by Land Use Category and C&I District. This section includes all permit applications filed in 2013.

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2013. These permit status categories are grouped into the following five major categories: (1) building permit applications that were *approved* for construction but not yet issued; (2) building permit applications that were *issued* but not completed; (3) *other* permit applications, which includes those that were not yet been acted upon, that were abandoned, reinstated, appealed, or for which no information was available; (4) building permit applications that were *cancelled*, including applications that have been withdrawn, revoked or disapproved; (5) building permit applications where the authorized work was *completed*.

The construction cost data reported in some tables are project cost estimates as reported by DBI, but are more usefully understood as estimates of construction expenditure or spending in the local and wider economy for each project. Hence, it's a measure of the size of the construction sector of the economy. Total and average construction cost data measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the extent of active permit applications, some of which are under construction in San Francisco for a particular year, average construction cost relates number of applications to total construction cost, revealing a rough estimate of project size. Construction cost data are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 1983 is designated as the base year (1983=100).

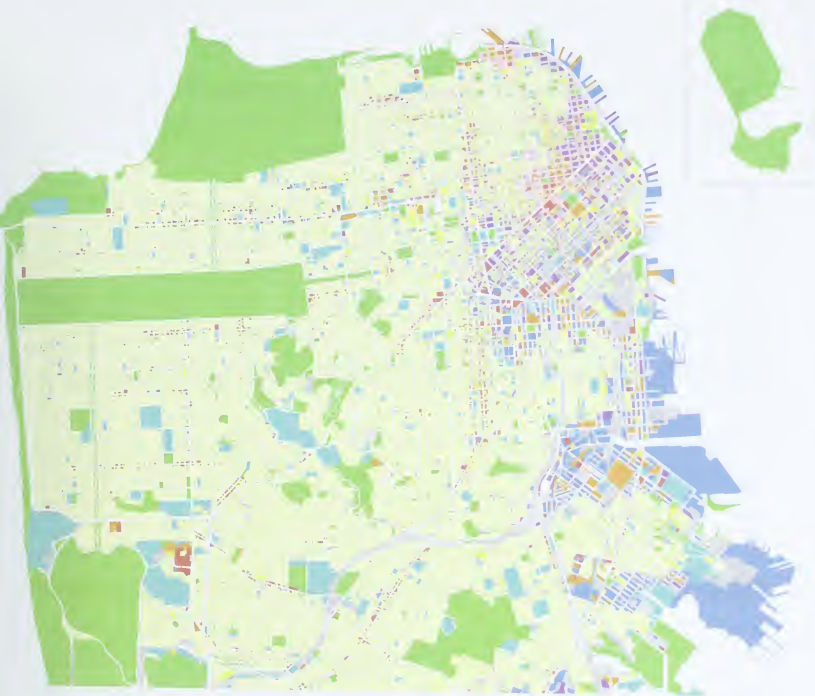
Section 6.5 reports total office space in San Francisco from 2004 to 2013. It includes absolute numbers as well as percentage changes over time. The source of these data is Cushman & Wakefield realtors.

6.2 LAND USE

Section 6.6 reports land use activity in San Francisco. Land use, for this section, is determined by incorporating both the business type on the parcel and the location of that parcel. Business data are culled from the Dun & Bradstreet databases. Dun & Bradstreet is a firm that conducts national surveys of existing businesses, gathering information that includes number of employees, square footage of businesses, and an industry classification system which best classifies those businesses. A parcel has to have 80% or more of its usable building space occupied by one specific land use in order to warrant that particular land use classification. Less than 80% in any one land use results in a Mixed Uses designation. If either the Planning Department or the Department of Building Inspection has a record of a residence on a lot, it is determined to be a Residential land use. If a lot contains a residence and a business establishment, that lot is classified as Mixed Residential.

Land Use is also determined by the location of a given parcel. The impact of location on land use classification is illustrated by the following example. If an establishment with a NAICS (North American Industry Classification System) code of 236 (Construction) is in the Financial District, it will be classified as Office use. If an establishment with the same NAICS code is located in South of Market or Bayview districts, it will be classified as PDR. Construction is generally considered part of the PDR land use classification. In the above scenario, however, the Financial District location of a construction business indicates that the business is conducting management, information, or professional services in more of an office setting and should therefore be assigned an Office land use classification.

The NAICS code for land uses under Office, Retail, PDR, Hotel, and Cultural/Institutional/ Educational (CIE) land use categories are noted in Table 1.2, Chapter 1. The Residential land use category data are gathered from Housing Inventory and the Department of Building Inspection's Permit Tracking System. Data on vacant sites are gathered from information supplied by the Assessor's Office. Table 6.6 provides details on the amount of square footage (building footprint, not total) for each land use, as a predominant use on each parcel of land for 20 plan areas in San Francisco. Map 6.2 shows the location of these 20 plan areas. Table 6.6 is based on the information available in year 2013.



Land Use San Francisco

MAP 6.1

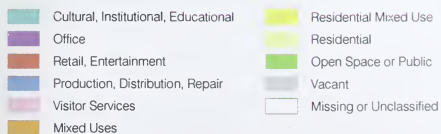


Table 6.1.1.A

ALL BUILDING PERMITS BY LAND USE CATEGORY, 2004-2013

This table presents the number of building permits filed by land use category (see Section 1.2 – Data Formats for a definition of land use categories). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	3,813	4,202	4,133	4,366	3,791	2,907	2,968	3,406	3,712	4,410
Retail	1,887	1,661	2,139	1,852	1,927	2,203	1,967	2,178	2,442	2,337
PDR	176	185	170	198	235	236	205	248	231	283
Hotel	183	144	193	253	310	260	126	198	224	249
CIE	364	356	429	459	602	547	494	541	618	696
Residential	19,930	19,508	19,653	19,939	18,226	15,714	15,533	15,288	15,876	17,800
Other	724	779	689	931	819	600	631	754	1,193	1,227
TOTAL	27,077	26,835	27,406	27,998	25,910	22,467	21,924	22,613	24,296	27,002

Annual Percentage Distribution

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	14.1	15.7	15.1	15.6	14.6	12.9	13.5	15.1	15.3	16.3
Retail	7.0	6.2	7.8	6.6	7.4	9.8	9.0	9.6	10.1	8.7
PDR	0.6	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0	1.0
Hotel	0.7	0.5	0.7	0.9	1.2	1.2	0.6	0.9	0.9	0.9
CIE	1.3	1.3	1.6	1.6	2.3	2.4	2.3	2.4	2.5	2.6
Residential	73.6	72.7	71.7	71.2	70.3	69.9	70.8	67.6	65.3	65.9
Other	2.7	2.9	2.5	3.3	3.2	2.7	2.9	3.3	4.9	4.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	10.2	-1.6	5.6	-13.2	-23.3	2.1	14.8	9.0	18.8
Retail	-12.0	28.8	-13.4	4.0	14.3	-10.7	10.7	12.1	-4.3
PDR	5.1	-8.1	16.5	18.7	0.4	-13.1	21.0	-6.9	22.5
Hotel	-21.3	34.0	31.1	22.5	-16.1	-51.5	57.1	13.1	11.2
CIE	-2.2	20.5	7.0	31.2	-9.1	-9.7	9.5	14.2	12.6
Residential	-2.1	0.7	1.5	-8.6	-13.8	-1.2	-1.6	3.8	12.1
Other	7.6	-11.6	35.1	-12.0	-26.7	5.2	19.5	58.2	2.8
TOTAL	-0.9	2.1	2.2	-7.5	-13.3	-2.4	3.1	7.4	11.1

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.1.B

TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 2004-2013

This table presents the total cost of construction associated with building permits filed by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$461,335	\$625,154	\$839,367	\$941,316	\$511,246	\$300,846	\$401,227	\$978,036	\$1,086,071	\$1,553,190
Retail	\$130,442	\$121,314	\$180,557	\$219,555	\$177,039	\$97,797	\$293,162	\$189,330	\$310,104	\$189,681
PDR	\$30,870	\$18,692	\$23,958	\$20,972	\$28,639	\$24,288	\$13,038	\$17,379	\$17,855	\$32,494
Hotel	\$6,642	\$38,957	\$79,714	\$77,228	\$42,364	\$27,307	\$21,058	\$55,877	\$32,558	\$109,525
CIE	\$289,846	\$79,100	\$146,650	\$117,816	\$126,563	\$98,413	\$213,826	\$181,024	\$322,186	\$153,223
Residential	\$1,716,855	\$2,480,737	\$1,606,733	\$1,218,243	\$848,972	\$705,879	\$1,354,259	\$1,585,538	\$2,250,092	\$3,107,472
Other	\$19,971	\$10,689	\$47,228	\$32,178	\$13,036	\$9,194	\$11,151	\$482,200	\$123,623	\$118,794
TOTAL	\$2,655,962	\$3,374,644	\$2,924,207	\$2,627,309	\$1,747,858	\$1,263,725	\$2,307,720	\$3,489,384	\$4,142,488	\$5,264,379

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	17.4	18.5	28.7	35.8	29.2	23.8	17.4	28.0	26.2	29.5
Retail	4.9	3.6	6.2	8.4	10.1	7.7	12.7	5.4	7.5	3.6
PDR	1.2	0.6	0.8	0.8	1.6	1.9	0.6	0.5	0.4	0.6
Hotel	10.9	2.3	5.0	4.5	7.2	7.8	9.3	5.2	7.8	2.1
CIE	0.3	1.2	2.7	2.9	2.4	2.2	0.9	1.6	0.8	2.9
Residential	64.6	73.5	54.9	46.4	48.6	55.9	58.7	45.4	54.3	59.0
Other	0.8	0.3	1.6	1.2	0.7	0.7	0.5	13.8	3.0	2.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	35.5	34.3	12.1	-45.7	-41.2	33.4	143.8	11.0	43.0
Retail	-7.0	48.8	21.6	-19.4	-44.8	199.8	-35.4	63.8	-38.8
PDR	-39.5	28.2	-12.5	36.6	-15.2	-46.3	33.3	2.7	82.0
Hotel	-72.7	85.4	-19.7	7.4	-22.2	117.3	-15.3	78.0	236.4
CIE	486.5	104.6	-3.1	-45.1	-35.5	-22.9	165.4	-41.7	-52.4
Residential	44.5	-35.2	-24.2	-30.3	-16.9	91.9	17.1	41.9	38.1
Other	-46.5	341.8	-31.9	-59.5	-29.5	21.3	4224.3	-74.4	-3.9
TOTAL	27.1	-13.3	-10.2	-33.5	-27.7	82.6	51.2	18.7	27.1

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

1. The large increase in 'Other' construction spending in 2011 is due to permits filed for the Transbay Terminal, a transportation facility.

Table 6.1.1.C

AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 2004-2013

This table presents the average construction cost for all building permits filed by land use category. It represents the total costs (Table 6.1.1.B) divided by the total permits (Table 6.1.1.A).

Average Construction Costs (Inflation-Adjusted 2013 \$ 000s)

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$121.0	\$148.8	\$203.1	\$215.6	\$134.9	\$103.5	\$135.2	\$287.2	\$292.6	\$352.2
Retail	\$69.1	\$73.0	\$84.4	\$118.6	\$91.9	\$44.4	\$149.0	\$86.9	\$127.0	\$81.2
PDR	\$175.4	\$101.0	\$140.9	\$105.9	\$121.9	\$102.9	\$63.6	\$70.1	\$77.3	\$114.8
Hotel	\$36.3	\$270.5	\$413.0	\$305.3	\$136.7	\$105.0	\$167.1	\$282.2	\$145.3	\$439.9
CIE	\$796.3	\$222.2	\$341.8	\$256.7	\$210.2	\$179.9	\$432.8	\$334.6	\$521.3	\$220.1
Residential	\$86.1	\$127.2	\$81.8	\$61.1	\$46.6	\$44.9	\$87.2	\$103.7	\$141.7	\$174.6
Other	\$27.6	\$13.7	\$68.5	\$34.6	\$15.9	\$15.3	\$17.7	\$639.5	\$103.6	\$96.8
Average	\$98.1	\$125.8	\$106.7	\$93.8	\$67.5	\$56.2	\$105.3	\$154.3	\$170.5	\$195.0

Percentage Change

<i>Land Use Category</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	23.0	36.5	6.2	-37.5	-23.3	30.6	112.4	1.9	20.4
Retail	5.7	15.6	40.4	-22.5	-51.7	235.7	-41.7	46.1	-36.1
PDR	-42.4	39.5	-24.8	15.1	-15.6	-38.2	10.2	10.3	48.6
Hotel	645.4	52.7	-26.1	-55.2	-23.1	59.1	68.9	-48.5	202.6
CIE	-72.1	53.8	-24.9	-18.1	-14.4	140.6	-22.7	55.8	-57.8
Residential	47.6	-35.7	-25.3	-23.8	-3.6	94.1	19.0	36.7	23.2
Other	-50.3	399.5	-49.6	-53.9	-3.7	15.3	3518.9	-83.8	-6.6
TOTAL	28.2	-15.2	-12.1	-28.1	-16.6	87.1	46.6	10.5	14.3

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department, Department of Building Inspection

Table 6.1.2.A

BUILDING PERMITS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 2004-2013

This table presents the number of building permits filed for new construction by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	2	6	5	11	9	0	1	8	9	8
Retail	16	10	10	8	5	6	10	9	10	8
PDR	7	4	13	7	13	4	5	5	5	9
Hotel	0	0	1	0	0	0	0	1	0	2
CIE	9	5	18	11	5	5	8	3	13	10
Residential	189	260	179	150	101	63	92	58	148	155
Other	2	0	4	1	0	3	0	9	15	9
TOTAL	265	288	225	285	230	81	116	93	200	201

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	0.8	2.1	2.2	3.9	3.9	0.0	0.9	8.6	4.5	4.0
Retail	6.0	3.5	4.4	2.8	2.2	7.4	8.6	9.7	5.0	4.0
PDR	2.6	1.4	5.8	2.5	5.7	4.9	4.3	5.4	2.5	4.5
Hotel	0.0	0.0	0.4	0.0	0.0	0.0	0.0	1.1	0.0	1.0
CIE	3.4	1.7	8.0	3.9	2.2	6.2	6.9	3.2	6.5	5.0
Residential	71.3	90.3	79.6	52.6	43.9	77.8	79.3	62.4	74.0	77.1
Other	0.8	0.0	1.8	0.4	0.0	3.7	0.0	9.7	7.5	4.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	200.0	-16.7	120.0	-18.2	-100.0	--	700.0	12.5	-11.1
Retail	-37.5	0.0	-20.0	-37.5	20.0	66.7	-10.0	11.1	-20.0
PDR	-42.9	225.0	-46.2	85.7	-69.2	25.0	0.0	0.0	80.0
Hotel	--	--	-100.0	--	--	--	--	-100.0	--
CIE	-44.4	260.0	-38.9	-54.5	0.0	60.0	-62.5	333.3	-23.1
Residential	37.6	-31.2	-16.2	-32.7	-37.6	46.0	-37.0	155.2	4.7
Other	-100.0	--	-75.0	-100.0	--	-100.0	--	66.7	-40.0
TOTAL	8.7	-21.9	26.7	-19.3	-64.8	43.2	-19.8	115.1	0.5

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.2.B

**TOTAL
CONSTRUCTION
COSTS FOR NEW
CONSTRUCTION
BY LAND USE
CATEGORY,
2004-2013**

This table presents the total cost of new construction associated with building permits filed by land use category over the last ten years. For consistency with previous C&I reports, costs are adjusted for inflation, with 2012 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$42,283	\$151,647	\$302,296	\$255,300	\$111,747	\$0	\$3,983	\$405,048	\$418,795	\$463,266
Retail	\$18,602	\$10,641	\$1,333	\$53,175	\$60,991	\$4,395	\$129,134	\$41,222	\$77,213	\$3,791
PDR	\$5,993	\$1,103	\$7,463	\$4,739	\$12,954	\$1,994	\$612	\$735	\$606	\$17,919
Hotel	\$0	\$0	\$13,730	\$0	\$0	\$0	\$0	\$28,617	\$0	\$49,215
CIE	\$38,041	\$18,680	\$39,711	\$22,483	\$24,555	\$23,272	\$134,842	\$19,333	\$120,950	\$27,414
Residential	\$1,101,880	\$1,786,296	\$1,022,424	\$485,888	\$232,579	\$245,472	\$801,495	\$1,160,437	\$1,661,401	\$2,081,111
Other	\$259	\$0	\$0	\$309	\$0	\$20	\$0	\$465,897	\$162,569	\$13,742
TOTAL	\$1,207,057	\$1,988,367	\$1,386,958	\$821,894	\$442,825	\$275,154	\$1,070,065	\$2,119,288	\$2,441,533	\$2,656,458

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	3.5	7.7	21.8	31.1	25.2	0.0	0.4	19.1	17.2	17.4
Retail	1.5	0.5	0.1	6.5	13.8	1.6	12.1	1.9	3.2	0.1
PDR	0.5	0.1	0.5	0.6	2.9	0.7	0.1	0.0	0.0	0.7
Hotel	0.0	0.0	1.0	0.0	0.0	0.0	0.0	1.3	0.0	1.9
CIE	3.2	0.9	2.9	2.7	5.5	8.5	12.6	0.9	5.0	1.0
Residential	91.3	90.8	73.7	59.1	52.5	89.2	74.9	54.8	68.0	78.3
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.0	6.7	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	258.6	99.3	-15.5	-56.2	-100.0	--	10,069.2	3.4	10.6
Retail	-42.8	-87.5	3,889.9	14.7	-92.8	2,837.9	-68.1	87.3	-95.1
PDR	-81.6	576.5	-36.5	173.4	-84.6	-69.3	20.2	-17.6	2,859.1
Hotel	--	--	-100.0	--	--	--	--	-100.0	--
CIE	-50.9	112.6	-43.4	9.2	-5.2	479.4	-85.7	525.6	-77.3
Residential	62.1	-42.8	-52.5	-52.1	5.5	226.5	44.8	43.2	25.3
Other	-100.0	--	--	-100.0	--	-100.0	--	-85.1	-91.5
TOTAL	63.1	-29.5	-40.7	-46.1	-37.9	288.9	98.1	15.2	8.8

Notes:

- PDR = Production/Distribution/Repair
- CIE = Commercial/Institutional/Educational

Sources:

San Francisco Planning Department, Department of Building Inspection

Table 6.1.2.C
AVERAGE
CONSTRUCTION
COSTS FOR NEW
CONSTRUCTION BY
LAND USE CATEGORY,
2004-2013

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$21,142	\$25,275	\$60,459	\$23,209	\$12,416	--	\$3,983	\$50,631	\$46,533	\$57,908
Retail	\$1,163	\$1,064	\$133	\$6,647	\$12,198	\$733	\$12,913	\$4,580	\$7,721	\$379
PDR	\$856	\$276	\$574	\$677	\$996	\$498	\$122	\$147	\$121	\$3,584
Hotel	--	--	\$13,730	--	--	--	--	\$26,617	--	--
CIE	\$4,227	\$3,736	\$2,206	\$2,044	\$4,911	\$4,654	\$16,855	\$6,444	\$9,304	\$2,109
Residential	\$3,830	\$6,870	\$5,712	\$3,239	\$2,303	\$3,896	\$8,712	\$20,008	\$11,226	\$13,967
Other	\$130	--	--	\$309	--	\$7	--	\$51,766	\$10,838	\$859
TOTAL	\$4,555	\$6,835	\$6,164	\$2,884	\$1,925	\$3,397	\$9,225	\$22,788	\$12,208	\$13,216

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	19.5	139.2	-61.6	-46.5	--	--	1,171.1	-8.1	24.4
Retail	-8.5	-87.5	4,887.4	83.5	-94.0	1,662.7	-64.5	68.6	-95.1
PDR	-67.8	108.2	17.9	47.2	-50.0	-75.5	20.2	-17.6	2,855.1
Hotel	--	--	--	--	--	--	--	--	--
CIE	-11.6	-40.9	-7.4	140.3	-5.2	262.1	-61.8	44.4	-77.3
Residential	17.8	-16.9	-43.3	-28.9	69.2	123.6	129.7	-43.9	24.4
Other	--	--	--	--	--	--	--	-79.1	-92.1
TOTAL	50.0	-9.8	-53.2	-33.2	76.4	171.6	147.0	-46.4	8.3

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

This table presents the average cost of new construction for all building permits filed by land use category. It represents the total costs (Table 6.1.2.B) divided by the total permits (Table 6.1.2.A).

Table 6.1.3.A

BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2004-2013

This table presents the number of building permits filed for alterations and demolitions by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	3,811	4,196	4,128	4,355	3,782	2,907	2,967	3,398	3,704	4,402
Retail	1,871	1,651	2,129	1,844	1,922	2,197	1,955	2,168	2,432	2,329
PDR	169	181	157	191	222	232	200	243	226	274
Hotel	183	144	192	253	310	260	126	197	224	247
CIE	355	351	411	448	597	542	486	538	606	686
Residential	19,741	19,249	19,474	19,789	18,125	15,651	15,441	15,230	15,728	17,645
Other	273	379	264	335	270	218	212	271	328	462
TOTAL	26,403	26,151	26,755	27,215	25,228	22,007	21,387	22,045	23,248	26,045

Annual Percentage Distribution

<i>Land Use Category</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	14.4	16.0	15.4	16.0	15.0	13.2	13.9	15.4	15.9	16.9
Retail	7.1	6.3	8.0	6.8	7.6	10.0	9.1	9.8	10.5	8.9
PDR	0.6	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0	1.1
Hotel	0.7	0.6	0.7	0.9	1.2	1.2	0.6	0.9	1.0	0.9
CIE	1.3	1.3	1.5	1.6	2.4	2.5	2.3	2.4	2.6	2.6
Residential	74.8	73.6	72.8	72.7	71.8	71.1	72.2	69.1	67.7	67.7
Other	1.0	1.4	1.0	1.2	1.1	1.0	1.0	1.2	1.4	1.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	10.1	-1.6	5.5	-13.2	-23.1	2.1	14.5	9.0	18.8
Retail	-11.8	29.0	-13.4	4.2	14.3	-11.0	10.9	12.2	-4.2
PDR	7.1	-13.3	21.7	16.2	4.5	-13.8	21.5	-7.0	21.2
Hotel	-21.3	33.3	31.8	22.5	-16.1	-51.5	56.3	13.7	10.3
CIE	-1.1	17.1	9.0	33.3	-9.2	-10.3	10.7	12.6	13.2
Residential	-2.5	1.2	1.6	-8.4	-13.6	-1.3	-1.4	3.3	12.2
Other	38.8	-30.3	26.9	-19.4	-19.3	-2.8	27.8	21.0	40.9
TOTAL	-1.0	2.3	1.7	-7.3	-12.8	-2.8	3.1	5.5	12.0

Notes: PDR = Production/Distribution/Repair, CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department, Department of Building Inspection

Table 6.1.3.B

TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2004-2013

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$419,052	\$473,507	\$537,071	\$686,016	\$399,499	\$300,846	\$397,243	\$572,988	\$667,276	\$1,089,924
Retail	\$111,841	\$110,673	\$179,224	\$166,381	\$116,048	\$93,401	\$164,024	\$148,107	\$232,891	\$185,890
PDR	\$24,877	\$17,589	\$16,495	\$16,233	\$15,685	\$22,294	\$12,426	\$16,644	\$17,249	\$14,575
Hotel	\$6,642	\$38,957	\$65,984	\$77,228	\$42,364	\$27,307	\$21,058	\$29,260	\$32,558	\$60,310
CIE	\$251,805	\$60,420	\$106,938	\$95,333	\$102,009	\$75,141	\$78,985	\$161,691	\$201,236	\$125,809
Residential	\$614,975	\$694,442	\$584,309	\$732,355	\$616,392	\$460,407	\$552,764	\$425,101	\$588,691	\$1,026,361
Other	\$1,574	\$3,694	\$9,214	\$8,074	\$6,567	\$4,941	\$5,514	\$10,611	\$144,294	\$65,692
TOTAL	\$1,430,766	\$1,399,282	\$1,499,235	\$1,781,620	\$1,298,564	\$984,337	\$1,232,014	\$1,364,402	\$1,884,195	\$2,568,561

Annual Percentage Distribution

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	29.3	33.8	35.8	38.5	30.8	30.6	32.2	42.0	35.4	42.4
Retail	7.8	7.9	12.0	9.3	8.9	9.5	13.3	10.9	12.4	7.2
PDR	1.7	1.3	1.1	0.9	1.2	2.3	1.0	1.2	0.9	0.6
Hotel	0.5	2.8	4.4	4.3	3.3	2.8	1.7	2.1	1.7	2.3
CIE	17.6	4.3	7.1	5.4	7.9	7.6	6.4	11.9	10.7	4.9
Residential	43.0	49.6	39.0	41.1	47.5	46.8	44.9	31.2	31.2	40.0
Other	0.1	0.3	0.6	0.5	0.5	0.5	0.4	0.8	7.7	2.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	13.0	13.4	27.7	-41.8	-24.7	32.0	44.2	16.5	63.3
Retail	-1.0	61.9	-7.2	-30.3	-19.5	75.6	-9.7	57.2	-20.2
PDR	-29.3	-6.2	-1.6	-3.4	42.1	-44.3	33.9	3.6	-15.5
Hotel	486.5	69.4	17.0	-45.1	-35.5	-22.9	38.9	11.3	85.2
CIE	-76.0	77.0	-10.9	7.0	-26.3	5.1	104.7	24.5	-37.5
Residential	12.9	-15.9	25.3	-15.8	-25.3	20.1	-23.1	38.5	74.3
Other	134.7	149.4	-12.4	-18.7	-24.8	11.6	92.4	1259.9	-54.5
TOTAL	-2.2	7.1	18.8	-27.1	-24.2	25.2	10.7	38.1	36.3

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.3.C

AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 2004-2013

This table presents the average construction cost for all building permits filed for alterations and demolitions by land use category. It represents the total costs (Table 6.1.3.B) divided by the total permits (Table 6.1.3.A).

Average Construction Costs (Inflation-Adjusted 2013 \$ 000s)

Land Use Category	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Office	\$110.0	\$112.8	\$130.1	\$157.5	\$105.6	\$103.5	\$133.9	\$168.6	\$180.2	\$247.6
Retail	\$59.8	\$67.0	\$84.2	\$90.2	\$60.4	\$42.5	\$83.9	\$68.3	\$95.8	\$79.8
PDR	\$147.2	\$97.2	\$105.1	\$85.0	\$70.7	\$96.1	\$62.1	\$68.5	\$76.3	\$53.2
Hotel	\$36.3	\$270.5	\$343.7	\$305.2	\$136.7	\$105.0	\$167.1	\$148.5	\$145.3	\$244.2
CIE	\$709.3	\$172.1	\$260.2	\$212.8	\$170.9	\$138.6	\$162.5	\$300.5	\$332.1	\$183.4
Residential	\$31.2	\$36.1	\$30.0	\$37.0	\$34.0	\$29.4	\$35.8	\$27.9	\$37.4	\$58.2
Other	\$5.8	\$9.7	\$34.9	\$24.1	\$24.3	\$22.7	\$26.0	\$39.2	\$439.9	\$142.2
TOTAL	\$54.2	\$53.5	\$56.0	\$65.5	\$51.5	\$44.7	\$57.6	\$61.9	\$81.0	\$98.6

Percentage Change

Land Use Category	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Office	2.6	15.3	21.1	-32.9	-2.0	29.4	25.9	6.8	37.4
Retail	12.1	25.6	7.2	-33.1	-29.6	97.4	-18.6	40.2	-16.7
PDR	-34.0	8.1	-19.1	-16.9	36.0	-35.3	10.2	11.4	-30.3
Hotel	645.4	27.0	-11.2	-55.2	-23.1	59.1	-11.1	-2.1	68.0
CIE	-75.7	51.2	-18.2	-19.7	-18.9	17.2	84.9	10.5	-44.8
Residential	15.8	-16.8	23.3	-8.1	-13.5	21.7	-22.0	34.1	55.4
Other	69.1	258.1	-30.9	0.9	-6.8	14.8	50.5	1023.5	-67.7
TOTAL	-1.3	4.7	16.8	-21.4	-13.1	28.8	7.4	31.0	21.7

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.1.A ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the number of building permits filed by Commerce & Industry District (see Section 1.2 - Data Formats for a definition of Commerce & Industry Districts). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	647	716	696	714	633	554	572	599	663	691
Civic Center	851	800	767	1,012	899	751	710	781	793	1,062
Financial	3,359	3,707	3,486	3,733	3,370	2,688	2,600	2,994	3,443	3,668
Mission	2,047	2,012	2,068	1,999	1,972	1,781	1,894	1,821	1,880	2,068
North Beach	799	860	840	801	832	713	649	730	709	918
North Central	3,578	3,612	3,853	4,054	3,506	3,202	2,981	2,916	3,221	3,493
Northwest	2,579	2,471	2,482	2,417	2,478	1,897	1,904	1,936	1,953	2,118
South of Market	2,043	2,127	2,527	2,269	2,263	2,072	1,969	2,131	2,481	2,913
Southwest	9,894	9,372	9,428	9,347	8,656	7,582	7,550	7,368	7,656	8,377
Van Ness	1,130	1,050	1,171	1,502	1,186	987	1,064	1,108	1,254	1,396
Unclassified	149	129	87	139	91	232	185	221	243	298
TOTAL	27,076	26,856	27,405	27,987	25,886	22,459	22,078	22,605	24,296	27,002

Annual Percentage Distribution

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	2.4	2.7	2.5	2.6	2.4	2.5	2.6	2.6	2.7	2.6
Civic Center	3.1	3.0	2.8	3.6	3.5	3.3	3.2	3.5	3.3	3.9
Financial	12.4	13.8	12.7	13.3	13.0	12.0	11.8	13.2	14.2	13.6
Mission	7.6	7.5	7.5	7.1	7.6	7.9	8.6	8.1	7.7	7.7
North Beach	3.0	3.2	3.1	2.9	3.2	3.2	2.9	3.2	2.9	3.4
North Central	13.2	13.4	14.1	14.5	13.5	14.3	13.5	12.9	13.3	12.9
Northwest	9.5	9.2	9.1	8.6	9.6	8.4	8.6	8.6	8.0	7.8
South of Market	7.5	7.9	9.2	8.1	8.7	9.2	8.9	9.4	10.2	10.8
Southwest	36.5	34.9	34.4	33.4	33.4	33.8	34.2	32.6	31.5	31.0
Van Ness	4.2	3.9	4.3	5.4	4.6	4.4	4.8	4.9	5.2	5.2
Unclassified	0.6	0.5	0.3	0.5	0.4	1.0	0.8	1.0	1.0	1.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	10.7	-2.8	2.6	-11.3	-12.5	3.2	4.7	10.7	4.2
Civic Center	-6.0	-4.1	31.9	-11.2	-16.5	-5.5	10.0	1.5	33.9
Financial	10.4	-6.0	7.1	-9.7	-20.2	-3.3	15.2	15.0	6.5
Mission	-1.7	2.8	-3.3	-1.4	-9.7	6.3	-3.9	3.2	10.0
North Beach	7.6	-2.3	-4.6	3.9	-14.3	-9.0	12.5	-2.9	29.5
North Central	1.0	6.7	5.2	-13.5	-8.7	-6.9	-2.2	10.5	8.4
Northwest	-4.2	0.4	-2.6	2.5	-23.4	0.4	1.7	0.9	8.4
South of Market	4.1	18.8	-10.2	-0.3	-8.4	-5.0	8.2	16.4	17.4
Southwest	-5.3	0.6	-0.9	-7.4	-12.4	-0.4	-2.4	3.9	9.4
Van Ness	-7.1	11.5	28.3	-21.0	-16.8	7.8	4.1	13.2	11.3
Unclassified	-13.4	-32.6	59.8	-34.5	154.9	-20.3	19.5	10.0	22.6
TOTAL	-0.8	2.0	2.1	-7.5	-13.2	-1.7	2.4	7.5	11.1

Table 6.2.1.B

TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the total cost of construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$64,258	\$371,694	\$83,175	\$114,167	\$23,401	\$141,249	\$43,973	\$33,855	\$71,567	\$138,261
Civic Center	\$107,664	\$89,423	\$173,063	\$113,992	\$86,221	\$57,866	\$153,323	\$84,738	\$540,381	\$330,547
Financial	\$973,281	\$1,061,812	\$701,208	\$560,427	\$475,339	\$262,885	\$527,394	\$459,512	\$1,077,999	\$1,204,748
Mission	\$96,192	\$126,099	\$95,812	\$119,628	\$57,285	\$51,153	\$67,636	\$72,626	\$69,216	\$142,374
North Beach	\$59,306	\$42,247	\$53,106	\$36,480	\$63,975	\$38,106	\$33,462	\$39,516	\$28,568	\$61,980
North Central	\$182,929	\$160,856	\$479,555	\$249,560	\$214,017	\$109,727	\$154,859	\$129,376	\$328,835	\$252,866
Northwest	\$103,095	\$106,246	\$107,740	\$158,399	\$102,768	\$59,181	\$73,047	\$63,971	\$84,312	\$89,284
South of Market	\$428,751	\$881,436	\$701,892	\$742,791	\$357,930	\$202,462	\$431,460	\$1,039,291	\$977,267	\$1,417,057
Southwest	\$511,752	\$393,580	\$332,159	\$337,499	\$299,068	\$280,129	\$283,295	\$218,421	\$298,865	\$406,612
Van Ness	\$102,800	\$112,670	\$124,896	\$188,997	\$64,190	\$50,184	\$47,215	\$195,760	\$133,481	\$205,778
Unclassified	\$25,934	\$28,580	\$71,602	\$5,368	\$3,663	\$10,783	\$492,057	\$1,152,318	\$630,568	\$1,014,871
TOTAL	\$2,655,962	\$3,374,643	\$2,924,208	\$2,627,308	\$1,747,857	\$1,263,725	\$2,307,721	\$3,489,384	\$4,241,049	\$5,264,378

Annual Percentage Distribution

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	2.4	11.0	2.8	4.3	1.3	11.2	1.9	1.0	1.7	2.6
Civic Center	4.1	2.6	5.9	4.3	4.9	4.6	6.6	2.4	12.7	6.3
Financial	36.6	31.5	24.0	21.3	27.2	20.8	22.9	13.2	25.4	22.9
Mission	3.6	3.7	3.3	4.6	3.3	4.0	2.9	2.1	1.6	2.7
North Beach	2.2	1.3	1.8	1.4	3.7	3.0	1.5	1.1	0.7	1.2
North Central	6.9	4.8	16.4	9.5	12.2	8.7	6.7	3.7	7.8	4.8
Northwest	3.9	3.1	3.7	6.0	5.9	4.7	3.2	1.8	2.0	1.7
South of Market	16.1	26.1	24.0	28.3	20.5	16.0	18.7	29.8	23.0	26.9
Southwest	19.3	11.7	11.4	12.8	17.1	22.2	12.3	6.3	7.0	7.7
Van Ness	3.9	3.3	4.3	7.2	3.7	4.0	2.0	5.6	3.1	3.9
Unclassified	1.0	0.8	2.4	0.2	0.2	0.9	21.3	33.0	14.9	19.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	478.4	-77.6	37.3	-79.5	503.6	-68.9	-23.0	111.4	93.2
Civic Center	-16.9	93.5	-34.1	-24.4	-32.9	165.0	-44.7	537.7	-38.8
Financial	9.1	-34.0	-20.1	-15.2	-44.7	100.6	-12.9	134.6	11.8
Mission	31.1	-24.0	24.9	-52.1	-10.7	32.2	7.4	-4.7	105.7
North Beach	-28.8	25.7	-31.3	75.4	-40.4	-12.2	18.1	-27.7	117.0
North Central	-12.1	198.1	-48.0	-14.2	-48.7	41.1	-16.5	154.2	-23.1
Northwest	3.1	1.4	47.0	-35.1	-42.4	23.4	-12.4	31.8	5.9
South of Market	105.6	-20.4	5.8	-51.8	-43.4	113.1	140.9	-6.0	45.0
Southwest	-23.1	-15.6	1.6	-11.4	-6.3	1.1	-22.9	36.8	36.1
Van Ness	9.6	10.9	51.3	-66.0	-21.8	-5.9	314.6	-31.8	54.2
Unclassified	10.2	150.5	-92.5	-31.8	194.4	4,463.3	134.2	-45.3	60.9
TOTAL	27.1	-13.3	-10.2	-33.5	-27.7	82.6	51.2	21.5	24.1

1. Starting in 2010, there are a large number of permits for which locational information is not available.
Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.1.C

AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the average construction cost for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.1.B) divided by the total permits (Table 6.2.1.A).

Average Construction Costs (Inflation-Adjusted 2013 \$ 000s)

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$99.3	\$519.1	\$119.5	\$159.9	\$37.0	\$255.0	\$76.9	\$56.5	\$107.9	\$200.1
Civic Center	\$126.5	\$111.8	\$225.6	\$112.6	\$95.9	\$77.1	\$215.9	\$108.5	\$681.4	\$311.2
Financial	\$289.8	\$286.4	\$201.1	\$150.1	\$141.1	\$97.8	\$202.8	\$153.5	\$313.1	\$328.4
Mission	\$47.0	\$62.7	\$46.3	\$59.8	\$29.0	\$28.7	\$35.7	\$39.9	\$36.8	\$68.8
North Beach	\$74.2	\$49.1	\$63.2	\$45.5	\$76.9	\$53.4	\$51.6	\$54.1	\$40.3	\$67.5
North Central	\$51.1	\$44.5	\$124.5	\$61.6	\$61.0	\$34.3	\$51.9	\$44.4	\$102.1	\$72.4
Northwest	\$40.0	\$43.0	\$43.4	\$65.5	\$41.5	\$31.2	\$38.4	\$33.0	\$43.2	\$42.2
South of Market	\$209.9	\$414.4	\$277.8	\$327.4	\$158.2	\$97.7	\$219.1	\$487.7	\$393.9	\$486.5
Southwest	\$51.7	\$42.0	\$35.2	\$36.1	\$34.6	\$36.9	\$37.5	\$29.6	\$39.0	\$48.5
Van Ness	\$91.0	\$107.3	\$106.7	\$125.8	\$54.1	\$50.8	\$44.4	\$176.7	\$106.4	\$147.4
Unclassified	\$174.1	\$221.6	\$823.0	\$38.6	\$40.3	\$46.5	\$2,659.8	\$5,214.1	\$2,594.9	\$3,405.6
Citywide Average	\$98.1	\$125.7	\$106.7	\$93.9	\$67.5	\$56.3	\$104.5	\$154.4	\$174.6	\$195.0

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	422.7	-77.0	33.8	-76.9	589.7	-69.8	-26.5	91.0	85.4
Civic Center	-11.6	101.9	-50.1	-14.9	-19.7	180.3	-49.8	528.1	-54.3
Financial	-1.1	-29.8	-25.4	-6.0	-30.7	107.4	-24.3	104.0	4.9
Mission	33.4	-26.1	29.2	-51.5	-1.1	24.3	11.7	-7.7	87.0
North Beach	-33.8	28.7	-28.0	68.8	-30.5	-3.5	5.0	-25.6	67.6
North Central	-12.9	179.5	-50.5	-0.8	-43.9	51.6	-14.6	130.1	-29.1
Northwest	7.6	1.0	51.0	-36.7	-24.8	23.0	-13.9	30.6	-2.4
South of Market	97.5	-33.0	17.9	-51.7	-38.2	124.3	122.6	-19.2	23.5
Southwest	-18.8	-16.1	2.5	-4.3	6.9	1.6	-21.0	31.7	24.3
Van Ness	18.0	-0.6	18.0	-57.0	-6.1	-12.7	298.1	-39.8	38.5
Unclassified	27.3	271.5	-95.3	4.2	15.5	5,622.6	96.0	-50.2	31.2
Citywide Average	28.1	-15.1	-12.0	-28.1	-16.7	85.8	47.7	13.1	11.7

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.A

BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the number of building permits filed for new construction by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	23	50	27	15	16	15	9	3	13	20
Civic Center	4	4	4	2	4	3	9	3	6	11
Financial	6	8	6	6	3	1	3	4	10	9
Mission	22	28	27	30	8	4	4	4	8	15
North Beach	5	2	1	0	1	0	0	1	1	2
North Central	16	42	23	18	14	2	11	7	17	15
Northwest	8	10	16	12	7	3	7	3	5	10
South of Market	30	39	32	23	20	9	8	19	21	34
Southwest	103	86	73	67	55	39	62	19	77	53
Van Ness	5	10	11	11	2	4	3	3	6	2
Unclassified	3	5	10	5	2	1	23	27	34	30
TOTAL	225	284	230	189	132	81	139	93	198	201

Annual Percentage Distribution

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	10.2	17.6	11.7	7.9	12.1	18.5	6.5	3.2	6.6	10.0
Civic Center	1.8	1.4	1.7	1.1	3.0	3.7	6.5	3.2	3.0	5.5
Financial	2.7	2.8	2.6	3.2	2.3	1.2	2.2	4.3	5.1	4.5
Mission	9.8	9.9	11.7	15.9	6.1	4.9	2.9	4.3	4.0	7.5
North Beach	2.2	0.7	0.4	0.0	0.8	0.0	0.0	1.1	0.5	1.0
North Central	7.1	14.8	10.0	9.5	10.6	2.5	7.9	7.5	8.6	7.5
Northwest	3.6	3.5	7.0	6.3	5.3	3.7	5.0	3.2	2.5	5.0
South of Market	13.3	13.7	13.9	12.2	15.2	11.1	5.8	20.4	10.6	16.9
Southwest	45.8	30.3	31.7	35.4	41.7	48.1	44.6	20.4	38.9	26.4
Van Ness	2.2	3.5	4.8	5.8	1.5	4.9	2.2	3.2	3.0	1.0
Unclassified	1.3	1.8	4.3	2.6	1.5	1.2	16.5	29.0	17.2	14.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	117.4	-46.0	-44.4	6.7	-6.3	-40.0	-66.7	333.3	53.8
Civic Center	0.0	0.0	-50.0	100.0	-25.0	200.0	-66.7	100.0	83.3
Financial	33.3	-25.0	0.0	-50.0	-66.7	200.0	33.3	150.0	-10.0
Mission	27.3	-3.6	11.1	-73.3	-50.0	0.0	0.0	100.0	87.5
North Beach	-60.0	-50.0	-100.0	--	-100.0	--	--	0.0	100.0
North Central	162.5	-45.2	-21.7	-22.2	-85.7	450.0	-36.4	142.9	-11.8
Northwest	25.0	60.0	-25.0	-41.7	-57.1	133.3	-57.1	66.7	100.0
South of Market	30.0	-17.9	-28.1	-13.0	-55.0	-11.1	137.5	10.5	61.9
Southwest	-16.5	-15.1	-8.2	-17.9	-29.1	59.0	-69.4	305.3	-31.2
Van Ness	100.0	10.0	0.0	-81.8	100.0	-25.0	0.0	100.0	-66.7
Unclassified	66.7	100.0	-50.0	-60.0	-50.0	2,200.0	17.4	25.9	-11.8
TOTAL	26.2	-19.0	-17.8	-30.2	-38.6	71.6	-33.1	112.9	1.5

Sources: San Francisco Planning Department, Department of Building Inspection

Table 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the total cost of new construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$30,656	\$343,724	\$20,494	\$39,902	\$5,354	\$108,062	\$22,447	\$781	\$49,609	\$108,809
Civic Center	\$15,774	\$39,775	\$105,592	\$2,530	\$11,780	\$11,568	\$93,092	\$26,058	\$69,249	\$206,847
Financial	\$625,905	\$610,008	\$306,627	\$150,446	\$25,551	\$18,854	\$192,889	\$151,015	\$673,841	\$655,601
Mission	\$45,267	\$63,125	\$47,483	\$37,032	\$4,124	\$3,619	\$6,255	\$4,683	\$5,772	\$52,157
North Beach	\$9,837	\$3,579	\$1,095	\$0	\$27,219	\$0	\$0	\$7,251	\$373	\$9,804
North Central	\$67,684	\$16,340	\$297,515	\$56,424	\$81,914	\$2,196	\$41,544	\$21,854	\$172,727	\$16,418
Northwest	\$9,175	\$17,873	\$11,972	\$75,600	\$17,910	\$2,463	\$4,431	\$3,360	\$4,366	\$7,075
South of Market	\$249,497	\$697,450	\$443,006	\$302,041	\$189,222	\$8,684	\$236,642	\$721,051	\$549,138	\$769,933
Southwest	\$88,927	\$86,255	\$67,105	\$60,229	\$72,097	\$99,033	\$92,252	\$13,561	\$70,639	\$94,630
Van Ness	\$44,252	\$64,436	\$43,751	\$94,826	\$5,959	\$15,123	\$5,456	\$148,411	\$53,747	\$39,100
Unclassified	\$20,085	\$25,802	\$42,319	\$2,864	\$1,695	\$5,548	\$375,056	\$1,021,262	\$572,071	\$696,084
TOTAL	\$1,207,059	\$1,968,367	\$1,386,959	\$821,894	\$442,825	\$275,152	\$1,070,064	\$2,119,287	\$2,221,532	\$2,656,458

Annual Percentage Distribution

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	2.5	17.5	1.5	4.9	1.2	39.3	2.1	0.0	2.2	4.1
Civic Center	1.3	2.0	7.6	0.3	2.7	4.2	8.7	1.2	3.1	7.8
Financial	51.9	31.0	22.1	18.3	5.8	6.9	18.0	7.1	30.3	24.7
Mission	3.8	3.2	3.4	4.5	0.9	1.3	0.6	0.2	0.3	2.0
North Beach	0.8	0.2	0.1	0.0	6.1	0.0	0.0	0.3	0.0	0.4
North Central	5.6	0.8	21.5	6.9	18.5	0.8	3.9	1.0	7.8	0.6
Northwest	0.8	0.9	0.9	9.2	4.0	0.9	0.4	0.2	0.2	0.3
South of Market	20.7	35.4	31.9	36.7	42.7	3.2	22.1	34.0	24.7	29.0
Southwest	7.4	4.4	4.8	7.3	16.3	36.0	8.6	0.6	3.2	3.6
Van Ness	3.7	3.3	3.2	11.5	1.3	5.5	0.5	7.0	2.4	1.5
Unclassified	1.7	1.3	3.1	0.3	0.4	2.0	35.0	48.2	25.8	26.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	1,021.2	-94.0	94.7	-86.6	1,918.3	-79.2	-96.5	6,252.0	119.3
Civic Center	152.2	165.5	-97.6	365.6	-1.8	704.7	-72.0	165.7	198.7
Financial	-2.5	-49.7	-50.9	-83.0	-26.2	923.1	-21.7	346.2	-2.7
Mission	39.5	-24.8	-22.0	-88.9	-12.2	72.8	-25.1	23.3	803.6
North Beach	-63.6	-69.4	-100.0	--	-100.0	--	--	-94.9	2,528.4
North Central	-75.9	1,720.8	-81.0	45.2	-97.3	1,790.1	-47.4	690.4	-90.5
Northwest	94.8	-33.0	531.5	-76.3	-86.2	79.9	-24.2	29.9	62.0
South of Market	179.5	-36.5	-31.8	-37.4	-95.4	2,625.0	204.7	-23.8	40.2
Southwest	-3.0	-22.2	-10.2	19.7	37.4	-6.8	-85.3	420.9	34.0
Van Ness	45.6	-32.1	116.7	-93.7	153.8	-63.9	2,620.1	-63.8	-27.3
Unclassified	28.5	64.0	-93.2	-40.8	227.3	6,660.2	172.3	-44.0	21.7
TOTAL	63.1	-29.5	-40.7	-46.1	-37.9	288.9	98.1	4.8	19.6

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.C

AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the average cost of new construction for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.2.B) divided by the total permits (Table 6.2.2.A).

Average Construction Costs (Inflation-Adjusted 2013 \$ 000s)

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$1,333	\$6,874	\$759	\$2,660	\$335	\$7,204	\$2,494	\$260	\$3,816	\$5,440
Civic Center	\$3,944	\$9,944	\$26,398	\$1,265	\$2,945	\$3,856	\$10,344	\$8,686	\$11,542	\$18,804
Financial	\$104,318	\$76,251	\$51,105	\$25,074	\$8,517	\$18,854	\$64,296	\$37,754	\$67,384	\$72,845
Mission	\$2,058	\$2,254	\$1,759	\$1,234	\$516	\$905	\$1,564	\$1,171	\$722	\$3,477
North Beach	\$1,967	\$1,790	\$1,095	--	\$27,219	--	--	\$7,251	\$373	\$4,902
North Central	\$4,230	\$389	\$12,935	\$3,135	\$5,851	\$1,099	\$3,777	\$3,122	\$10,160	\$1,095
Northwest	\$1,147	\$1,787	\$748	\$6,300	\$2,559	\$821	\$633	\$1,120	\$873	\$708
South of Market	\$8,317	\$17,883	\$13,844	\$13,132	\$9,461	\$965	\$29,580	\$37,950	\$26,149	\$22,645
Southwest	\$863	\$1,003	\$919	\$899	\$1,311	\$2,539	\$1,488	\$714	\$917	\$1,785
Van Ness	\$8,850	\$6,444	\$3,977	\$8,621	\$2,980	\$3,781	\$1,819	\$49,470	\$8,958	\$19,550
Unclassified	\$6,695	\$5,160	\$4,232	\$573	\$848	\$5,548	\$16,307	\$37,825	\$16,826	\$23,203
Citywide Average	\$5,365	\$6,931	\$6,030	\$4,349	\$3,355	\$3,397	\$7,698	\$22,788	\$11,220	\$13,216

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	415.8	-89.0	250.5	-87.4	2,052.9	-65.4	-89.6	1,365.8	42.6
Civic Center	152.2	165.5	-95.2	132.8	30.9	168.2	-16.0	32.9	62.9
Financial	-26.9	-33.0	-50.9	-66.0	121.4	241.0	-41.3	78.5	8.1
Mission	9.6	-22.0	-29.8	-58.2	75.5	72.8	-25.1	-38.4	381.9
North Beach	-9.0	-38.8	--	-100.0	--	-100.0	--	-94.9	1,214.2
North Central	-90.8	3,224.9	-75.8	86.7	-81.2	243.7	-17.3	225.4	-89.2
Northwest	55.8	-58.1	742.0	-59.4	-67.9	-22.9	76.9	-22.0	-19.0
South of Market	115.0	-22.6	-5.1	-28.0	-89.8	2,965.7	28.3	-31.1	-13.4
Southwest	16.2	-8.3	-2.2	45.8	93.7	-41.4	-52.0	28.5	94.6
Van Ness	-27.2	-38.3	116.7	-65.4	26.9	-51.9	2,620.1	-81.9	118.2
Unclassified	-22.9	-18.0	-86.5	48.0	554.6	193.9	132.0	-55.5	37.9
Citywide Average	29.2	-13.0	-27.9	-22.9	1.3	126.6	196.0	-50.8	17.8

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.A

BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the number of building permits filed for alterations and demolitions by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	613	654	648	690	601	524	544	572	635	646
Civic Center	820	763	736	969	843	723	674	734	736	1,003
Financial	3,263	3,612	3,419	3,629	3,238	2,608	2,508	2,882	3,213	3,548
Mission	2,008	1,963	2,023	1,941	1,939	1,753	1,864	1,785	1,839	2,019
North Beach	768	849	823	787	805	689	626	705	673	836
North Central	3,514	3,519	3,789	3,967	3,433	3,165	2,943	2,870	3,116	3,401
Northwest	2,554	2,447	2,435	2,352	2,440	1,874	1,877	1,916	1,904	2,045
South of Market	1,929	2,011	2,381	2,110	2,152	2,004	1,841	2,019	2,298	2,722
Southwest	9,707	9,214	9,283	9,173	8,519	7,476	7,431	7,282	7,435	8,216
Van Ness	1,090	1,024	1,149	1,460	1,148	956	1,048	1,085	1,208	1,356
Unclassified	136	114	68	125	88	227	156	187	191	253
TOTAL	26,402	26,170	26,754	27,203	25,206	21,999	21,512	22,037	23,248	26,045

Annual Percentage Distribution

<i>C&I District</i>	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	2.3	2.5	2.4	2.5	2.4	2.4	2.5	2.6	2.7	2.5
Civic Center	3.1	2.9	2.8	3.6	3.3	3.3	3.1	3.3	3.2	3.9
Financial	12.4	13.8	12.8	13.3	12.8	11.9	11.7	13.1	13.8	13.6
Mission	7.6	7.5	7.6	7.1	7.7	8.0	8.7	8.1	7.9	7.8
North Beach	2.9	3.2	3.1	2.9	3.2	3.1	2.9	3.2	2.9	3.2
North Central	13.3	13.4	14.2	14.6	13.6	14.4	13.7	13.0	13.4	13.1
Northwest	9.7	9.4	9.1	8.6	9.7	8.5	8.7	8.7	8.2	7.9
South of Market	7.3	7.7	8.9	7.8	8.5	9.1	8.6	9.2	9.9	10.5
Southwest	36.8	35.2	34.7	33.7	33.8	34.0	34.5	33.0	32.0	31.5
Van Ness	4.1	3.9	4.3	5.4	4.6	4.3	4.9	4.9	5.2	5.2
Unclassified	0.5	0.4	0.3	0.5	0.3	1.0	0.7	0.8	0.8	1.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	6.7	-0.9	6.5	-12.9	-12.8	3.8	5.1	11.0	1.7
Civic Center	-7.0	-3.5	31.7	-13.0	-14.2	-6.8	8.9	0.3	36.3
Financial	10.7	-5.3	6.1	-10.8	-19.5	-3.8	14.9	11.5	10.4
Mission	-2.2	3.1	-4.1	-0.1	-9.6	6.3	-4.2	3.0	9.8
North Beach	10.5	-3.1	-4.4	2.3	-14.4	-9.1	12.6	-4.5	24.2
North Central	0.1	7.7	4.7	-13.5	-7.8	-7.0	-2.5	8.6	9.1
Northwest	-4.2	-0.5	-3.4	3.7	-23.2	0.2	2.1	-0.6	7.4
South of Market	4.3	18.4	-11.4	2.0	-6.9	-8.1	9.7	13.8	18.5
Southwest	-5.1	0.7	-1.2	-7.1	-12.2	-0.6	-2.0	2.1	10.5
Van Ness	-6.1	12.2	27.1	-21.4	-16.7	9.6	3.5	11.3	12.3
Unclassified	-16.2	-40.4	83.8	-29.6	158.0	-31.3	19.9	2.1	32.5
TOTAL	-0.9	2.2	1.7	-7.3	-12.7	-2.2	2.4	5.5	12.0

Table 6.2.3.B

TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District. For ease of comprehension, costs are adjusted for inflation, with 2013 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 2013 \$ 000s)

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$20,119	\$27,386	\$31,500	\$74,118	\$17,873	\$31,912	\$18,722	\$32,912	\$20,717	\$27,877
Civic Center	\$91,376	\$49,417	\$67,289	\$111,009	\$74,161	\$46,162	\$60,089	\$58,381	\$361,825	\$123,515
Financial	\$346,194	\$451,146	\$392,531	\$399,262	\$447,694	\$243,240	\$334,053	\$308,076	\$402,785	\$541,018
Mission	\$50,850	\$62,585	\$48,174	\$82,490	\$53,082	\$47,386	\$61,310	\$67,804	\$63,189	\$89,342
North Beach	\$49,318	\$38,639	\$51,906	\$36,134	\$36,586	\$38,025	\$33,354	\$32,101	\$28,092	\$50,040
North Central	\$114,902	\$144,250	\$181,857	\$192,835	\$131,016	\$107,309	\$113,211	\$107,410	\$155,056	\$235,701
Northwest	\$93,763	\$88,323	\$95,541	\$82,480	\$84,758	\$66,634	\$68,522	\$60,569	\$79,856	\$81,719
South of Market	\$178,641	\$180,972	\$257,004	\$433,718	\$166,850	\$193,464	\$193,585	\$314,191	\$425,602	\$634,062
Southwest	\$421,417	\$305,691	\$264,155	\$276,181	\$226,522	\$180,059	\$190,500	\$204,610	\$211,202	\$309,527
Van Ness	\$58,413	\$48,168	\$80,118	\$90,929	\$58,054	\$34,924	\$41,735	\$47,302	\$79,014	\$165,754
Unclassified	\$5,771	\$2,704	\$29,160	\$2,464	\$1,968	\$5,224	\$116,932	\$131,048	\$56,858	\$310,004
TOTAL	\$1,430,764	\$1,399,281	\$1,499,235	\$1,781,620	\$1,298,564	\$984,339	\$1,232,013	\$1,364,404	\$1,884,196	\$2,568,559

Annual Percentage Distribution

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	1.4	2.0	2.1	4.2	1.4	3.2	1.5	2.4	1.1	1.1
Civic Center	6.4	3.5	4.5	6.2	5.7	4.7	4.9	4.3	19.2	4.8
Financial	24.2	32.2	26.2	22.4	34.5	24.7	27.1	22.6	21.4	21.1
Mission	3.6	4.5	3.2	4.6	4.1	4.8	5.0	5.0	3.4	3.5
North Beach	3.4	2.8	3.5	2.0	2.8	3.9	2.7	2.4	1.5	1.9
North Central	8.0	10.3	12.1	10.8	10.1	10.9	9.2	7.9	8.2	9.2
Northwest	6.6	6.3	6.4	4.6	6.5	5.8	5.6	4.4	4.2	3.2
South of Market	12.5	12.9	17.1	24.3	12.8	19.7	15.7	23.0	22.6	24.7
Southwest	29.5	21.8	17.6	15.5	17.4	18.3	15.5	15.0	11.2	12.1
Van Ness	4.1	3.4	5.3	5.1	4.5	3.5	3.4	3.5	4.2	6.5
Unclassified	0.4	0.2	1.9	0.1	0.2	0.5	9.5	9.6	3.0	12.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	36.1	15.0	135.3	-75.9	78.5	-41.3	75.8	-37.1	34.6
Civic Center	-45.9	36.2	65.0	-33.2	-37.8	30.2	-2.8	519.8	-65.9
Financial	30.3	-13.0	1.7	12.1	-45.7	37.3	-7.8	30.7	34.3
Mission	23.1	-23.0	71.2	-35.7	-10.7	29.4	10.6	-6.8	41.4
North Beach	-21.7	34.3	-30.4	1.3	3.9	-12.3	-3.8	-12.5	78.1
North Central	25.5	26.1	6.0	-32.1	-18.1	5.5	-5.1	44.4	52.0
Northwest	-5.8	8.2	-13.7	2.8	-33.2	21.0	-11.6	31.8	2.3
South of Market	1.3	42.0	68.8	-61.5	16.0	0.1	62.3	35.5	49.0
Southwest	-27.5	-13.6	4.6	-18.0	-20.5	5.8	7.4	3.2	46.6
Van Ness	-17.5	66.3	13.5	-36.2	-39.8	19.5	13.3	67.0	109.8
Unclassified	-53.1	978.4	-91.6	-20.1	165.4	2138.4	12.1	-56.6	445.2
TOTAL	-2.2	7.1	18.8	-27.1	-24.2	25.2	10.7	38.1	36.3

Table 6.2.3.C

AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2004-2013

This table presents the average construction cost for all building permits filed for alterations and demolitions by Commerce & Industry District. It represents the total costs (Table 6.2.3.B) divided by the total permits (Table 6.2.3.A).

Average Construction Costs (Inflation-Adjusted 2013 \$ 000s)

C&I District	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bayview	\$32.8	\$41.9	\$48.6	\$107.4	\$29.7	\$60.9	\$34.4	\$57.5	\$32.6	\$43.2
Civic Center	\$111.4	\$64.8	\$91.4	\$114.6	\$88.0	\$63.8	\$89.2	\$79.5	\$491.6	\$123.1
Financial	\$106.1	\$124.9	\$114.8	\$110.0	\$138.3	\$93.3	\$133.2	\$106.9	\$125.4	\$152.5
Mission	\$25.3	\$31.9	\$23.8	\$42.5	\$27.4	\$27.0	\$32.9	\$38.0	\$34.4	\$44.3
North Beach	\$64.2	\$45.5	\$63.1	\$45.9	\$45.4	\$55.2	\$53.3	\$45.5	\$41.7	\$59.9
North Central	\$32.7	\$41.0	\$48.0	\$48.6	\$38.2	\$33.9	\$38.5	\$37.4	\$49.8	\$69.3
Northwest	\$36.7	\$36.1	\$39.2	\$35.1	\$34.7	\$30.2	\$36.5	\$31.6	\$41.9	\$40.0
South of Market	\$92.6	\$90.0	\$107.9	\$205.6	\$77.5	\$96.5	\$105.2	\$155.6	\$185.2	\$232.9
Southwest	\$43.4	\$33.2	\$28.5	\$30.1	\$26.6	\$24.1	\$25.6	\$28.1	\$28.4	\$37.7
Van Ness	\$53.6	\$47.0	\$69.7	\$62.3	\$50.6	\$36.5	\$39.8	\$43.6	\$65.4	\$122.2
Unclassified	\$42.4	\$23.7	\$428.8	\$19.7	\$22.4	\$23.0	\$749.6	\$700.8	\$297.7	\$1,225.3
Citywide Average	\$54.2	\$53.5	\$56.0	\$65.5	\$51.5	\$44.7	\$57.3	\$61.9	\$81.0	\$98.6

Percentage Change

C&I District	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Bayview	27.6	16.1	121.0	-72.3	104.8	-43.5	67.2	-43.3	32.3
Civic Center	-41.9	41.2	25.3	-23.2	-27.4	39.6	-10.8	518.1	-75.0
Financial	17.7	-8.1	-4.2	25.7	-32.5	42.8	-19.7	17.3	21.6
Mission	25.9	-25.3	78.5	-35.6	-1.3	21.7	15.5	-9.5	28.8
North Beach	-29.1	38.6	-27.2	-1.0	21.4	-3.5	-14.5	-8.3	43.4
North Central	25.4	17.1	1.3	-21.5	-11.2	13.5	-2.7	33.0	39.3
Northwest	-1.7	8.7	-10.6	-0.9	-13.0	20.8	-13.4	32.7	-4.7
South of Market	-2.8	19.9	90.4	-62.3	24.5	8.9	48.0	19.0	25.8
Southwest	-23.6	-14.2	5.8	-11.7	-9.4	6.4	9.6	1.1	32.6
Van Ness	-12.2	48.2	-10.7	-18.8	-27.8	9.0	9.5	50.0	86.9
Unclassified	-44.1	1707.9	-95.4	13.5	2.9	3157.1	-6.5	-57.5	311.6
Citywide Average	-1.3	4.8	16.9	-21.3	-13.1	28.0	8.1	30.9	21.7

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.A
PERMIT APPLICATIONS
BY COMMERCE &
INDUSTRY DISTRICT AND
LAND USE CATEGORY,
2013

This table presents the permit applications by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Number of Permits

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	69	61	69	0	25	400	67	691
Civic Center	261	170	15	58	57	438	63	1,062
Financial	2,561	423	16	56	68	402	142	3,668
Mission	108	187	38	10	59	1,605	61	2,068
North Beach	67	116	3	18	35	591	88	918
North Central	69	271	5	16	112	2,905	115	3,493
Northwest	37	120	5	2	42	1,816	96	2,118
South of Market	1,032	455	90	58	91	989	198	2,913
Southwest	115	368	30	7	153	7,514	190	8,377
Van Ness	67	159	8	23	39	1,055	45	1,396
Unclassified	24	7	4	1	15	85	162	298
TOTAL	4,410	2,337	283	249	696	17,800	1,227	27,002

Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	1.6	2.6	24.4	0.0	3.6	2.2	5.5	2.6
Civic Center	5.9	7.3	5.3	23.3	8.2	2.5	5.1	3.9
Financial	58.1	18.1	5.7	22.5	9.8	2.3	11.6	13.6
Mission	2.4	8.0	13.4	4.0	8.5	9.0	5.0	7.7
North Beach	1.5	5.0	1.1	7.2	5.0	3.3	7.2	3.4
North Central	1.6	11.6	1.8	6.4	16.1	16.3	9.4	12.9
Northwest	0.8	5.1	1.8	0.8	6.0	10.2	7.8	7.8
South of Market	23.4	19.5	31.8	23.3	13.1	5.6	16.1	10.8
Southwest	2.6	15.7	10.6	2.8	22.0	42.2	15.5	31.0
Van Ness	1.5	6.8	2.8	9.2	5.6	5.9	3.7	5.2
Unclassified	0.5	0.3	1.4	0.4	2.2	0.5	13.2	1.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	10.0	8.8	10.0	0.0	3.6	57.9	9.7	100.0
Civic Center	24.6	16.0	1.4	5.5	5.4	41.2	5.9	100.0
Financial	69.8	11.5	0.4	1.5	1.9	11.0	3.9	100.0
Mission	5.2	9.0	1.8	0.5	2.9	77.6	2.9	100.0
North Beach	7.3	12.6	0.3	2.0	3.8	64.4	9.6	100.0
North Central	2.0	7.8	0.1	0.5	3.2	83.2	3.3	100.0
Northwest	1.7	5.7	0.2	0.1	2.0	85.7	4.5	100.0
South of Market	35.4	15.6	3.1	2.0	3.1	34.0	6.8	100.0
Southwest	1.4	4.4	0.4	0.1	1.8	89.7	2.3	100.0
Van Ness	4.8	11.4	0.6	1.6	2.8	75.6	3.2	100.0
Unclassified	8.1	2.3	1.3	0.3	5.0	28.5	54.4	100.0
TOTAL	16.3	8.7	1.0	0.9	2.6	65.9	4.5	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.B

TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2013

This table presents the total construction cost for all permit applications by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Total Construction Costs (2013 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	\$10,373	\$1,703	\$19,078	\$0	\$2,878	\$101,492	\$2,738	\$138,261
Civic Center	\$28,742	\$10,033	\$1,347	\$16,524	\$27,894	\$245,072	\$935	\$330,547
Financial	\$781,515	\$62,210	\$863	\$24,197	\$13,489	\$290,803	\$31,672	\$1,204,748
Mission	\$10,261	\$4,659	\$2,110	\$3,356	\$15,661	\$104,597	\$1,732	\$142,374
North Beach	\$4,674	\$9,358	\$1,360	\$1,107	\$13,823	\$29,109	\$2,550	\$61,980
North Central	\$3,441	\$12,489	\$396	\$692	\$22,865	\$208,972	\$4,011	\$252,866
Northwest	\$2,479	\$8,259	\$106	\$50	\$5,066	\$72,655	\$669	\$89,284
South of Market	\$316,114	\$46,667	\$4,944	\$52,519	\$19,025	\$934,865	\$42,923	\$1,417,057
Southwest	\$62,384	\$25,994	\$1,723	\$591	\$19,657	\$291,286	\$4,977	\$406,612
Van Ness	\$8,591	\$7,705	\$544	\$10,491	\$5,596	\$171,701	\$1,150	\$205,778
Unclassified	\$324,616	\$604	\$24	\$0	\$7,270	\$656,920	\$25,437	\$1,014,871
TOTAL	\$1,553,190	\$189,681	\$32,494	\$109,525	\$153,223	\$3,107,472	\$118,794	\$5,264,379

Annual Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.7	0.9	58.7	0.0	1.9	3.3	2.3	2.6
Civic Center	1.9	5.3	4.1	15.1	18.2	7.9	0.8	6.3
Financial	50.3	32.8	2.7	22.1	8.8	9.4	26.7	22.9
Mission	0.7	2.5	6.5	3.1	10.2	3.4	1.5	2.7
North Beach	0.3	4.9	4.2	1.0	9.0	0.9	2.1	1.2
North Central	0.2	6.6	1.2	0.6	14.9	6.7	3.4	4.8
Northwest	0.2	4.4	0.3	0.0	3.3	2.3	0.6	1.7
South of Market	20.4	24.6	15.2	48.0	12.4	30.1	36.1	26.9
Southwest	4.0	13.7	5.3	0.5	12.8	9.4	4.2	7.7
Van Ness	0.6	4.1	1.7	9.6	3.7	5.5	1.0	3.9
Unclassified	20.9	0.3	0.1	0.0	4.7	21.1	21.4	19.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Annual Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	7.5	1.2	13.8	0.0	2.1	73.4	2.0	100.0
Civic Center	8.7	3.0	0.4	5.0	8.4	74.1	0.3	100.0
Financial	64.9	5.2	0.1	2.0	1.1	24.1	2.6	100.0
Mission	7.2	3.3	1.5	2.4	11.0	73.5	1.2	100.0
North Beach	7.5	15.1	2.2	1.8	22.3	47.0	4.1	100.0
North Central	1.4	4.9	0.2	0.3	9.0	82.6	1.6	100.0
Northwest	2.8	9.3	0.1	0.1	5.7	81.4	0.7	100.0
South of Market	22.3	3.3	0.3	3.7	1.3	66.0	3.0	100.0
Southwest	15.3	6.4	0.4	0.1	4.8	71.6	1.2	100.0
Van Ness	4.2	3.7	0.3	5.1	2.7	83.4	0.6	100.0
Unclassified	32.0	0.1	0.0	0.0	0.7	64.7	2.5	100.0
TOTAL	29.5	3.6	0.6	2.1	2.9	59.0	2.3	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.C
AVERAGE CONSTRUCTION COSTS FOR ALL PERMITS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2013

This table presents the average construction cost for all permit applications by both Commerce & Industry District and Land Use Category. It represents the total costs (Table 6.3.B) divided by the total permits (Table 6.3.A).

Average Construction Costs (2013 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	Average
Bayview	\$150.3	\$27.9	\$276.5	#DIV/0!	\$115.1	\$253.7	\$40.9	\$200.1
Civic Center	\$110.1	\$59.0	\$89.8	\$284.9	\$489.4	\$559.5	\$14.8	\$311.2
Financial	\$305.2	\$147.1	\$53.9	\$432.1	\$198.4	\$723.4	\$223.0	\$328.4
Mission	\$95.0	\$24.9	\$55.5	\$335.6	\$265.4	\$65.2	\$28.4	\$68.8
North Beach	\$69.8	\$80.7	\$453.3	\$61.5	\$394.9	\$49.3	\$29.0	\$67.5
North Central	\$49.9	\$46.1	\$79.2	\$43.2	\$204.2	\$71.9	\$34.9	\$72.4
Northwest	\$67.0	\$68.8	\$21.1	\$25.0	\$120.6	\$40.0	\$7.0	\$42.2
South of Market	\$306.3	\$102.6	\$54.9	\$905.5	\$209.1	\$945.3	\$216.8	\$486.5
Southwest	\$542.5	\$70.6	\$57.4	\$84.4	\$128.5	\$38.8	\$26.2	\$48.5
Van Ness	\$128.2	\$48.5	\$68.1	\$456.1	\$143.5	\$162.7	\$25.6	\$147.4
Unclassified	\$13,525.7	\$86.3	\$5.9	\$0.0	\$484.7	\$7,728.5	\$157.0	\$3,405.6
Citywide Average	\$352.2	\$81.2	\$114.8	\$439.9	\$220.1	\$174.6	\$96.8	\$195.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.1.A
ALL BUILDING PERMITS BY LAND USE CATEGORY AND PERMIT STATUS, 2013

This table presents the status of building permits by Land Use Category. Also included is the percentage distribution by Land Use Category and by permit status.

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	12	6	3,040	1,123	229	4,410
Retail	24	9	1,490	605	209	2,337
PDR	5	0	168	88	22	283
Hotel	3	0	126	88	32	249
CIE	9	2	400	225	60	696
Residential	95	68	11,641	5,063	933	17,800
Other	12	10	452	379	374	1,227
TOTAL	160	95	17,317	7,571	1,859	27,002

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	7.5	6.3	17.6	14.8	12.3	16.3
Retail	15.0	9.5	8.6	8.0	11.2	8.7
PDR	3.1	0.0	1.0	1.2	1.2	1.0
Hotel	1.9	0.0	0.7	1.2	1.7	0.9
CIE	5.6	2.1	2.3	3.0	3.2	2.6
Residential	59.4	71.6	67.2	66.9	50.2	65.9
Other	7.5	10.5	2.6	5.0	20.1	4.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.3	0.1	68.9	25.5	5.2	100.0
Retail	1.0	0.4	63.8	25.9	8.9	100.0
PDR	1.8	0.0	59.4	31.1	7.8	100.0
Hotel	1.2	0.0	50.6	35.3	12.9	100.0
CIE	1.3	0.3	57.5	32.3	8.6	100.0
Residential	0.5	0.4	65.4	28.4	5.2	100.0
Other	1.0	0.8	36.8	30.9	30.5	100.0
TOTAL	0.6	0.4	64.1	28.0	6.9	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.1.B

TOTAL CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2013

This table presents the construction cost of building permits by Land Use Category and by permit status. Also included is the percentage distribution by Land Use Category and by permit status.

Total Construction Costs (2013 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$1,403	\$381	\$506,611	\$678,537	\$366,260	\$1,553,190
Retail	\$1,373	\$372	\$110,885	\$71,608	\$5,443	\$189,681
PDR	\$71	\$0	\$7,902	\$22,340	\$2,181	\$32,494
Hotel	\$293	\$0	\$17,341	\$68,959	\$22,932	\$109,525
CIE	\$2,710	\$0	\$41,160	\$83,477	\$25,876	\$153,223
Residential	\$19,476	\$1,192	\$250,700	\$1,208,865	\$1,627,239	\$3,107,472
Other	\$457	\$25	\$7,534	\$56,346	\$54,432	\$118,794
TOTAL	\$25,782	\$1,969	\$942,132	\$2,190,132	\$2,104,364	\$5,264,379

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	5.4	19.3	53.8	31.0	17.4	29.5
Retail	5.3	18.9	11.8	3.3	0.3	3.6
PDR	0.3	0.0	0.8	1.0	0.1	0.6
Hotel	1.1	0.0	1.8	3.1	1.1	2.1
CIE	10.5	0.0	4.4	3.8	1.2	2.9
Residential	75.5	60.5	26.6	55.2	77.3	59.0
Other	1.8	1.3	0.8	2.6	2.6	2.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.1	0.0	32.6	43.7	23.6	100.0
Retail	0.7	0.2	58.5	37.8	2.9	100.0
PDR	0.2	0.0	24.3	68.8	6.7	100.0
Hotel	0.3	0.0	15.8	63.0	20.9	100.0
CIE	1.8	0.0	26.9	54.5	16.9	100.0
Residential	0.6	0.0	8.1	38.9	52.4	100.0
Other	0.4	0.0	6.3	47.4	45.8	100.0
TOTAL	0.5	0.0	17.9	41.6	40.0	100.0

Table 6.4.1.C

AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2013

This table presents the average construction cost for all permit applications by both Land Use Category and permit status. It represents the total costs (Table 6.4.1.B) divided by the total permits (Table 6.4.1.A).

Average Construction Costs (2013 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$116.9	\$63.5	\$166.6	\$604.2	\$1,599.4	\$352.2
Retail	\$57.2	\$41.3	\$74.4	\$118.4	\$26.0	\$81.2
PDR	\$14.2	--	\$47.0	\$253.9	\$99.1	\$114.8
Hotel	\$97.7	--	\$137.6	\$783.6	\$716.6	\$439.9
CIE	\$301.1	--	\$102.9	\$371.0	\$431.3	\$220.1
Residential	\$205.0	\$17.5	\$21.5	\$238.8	\$1,744.1	\$174.6
Other	\$38.0	\$2.5	\$16.7	\$148.7	\$145.5	\$96.8
TOTAL	\$161.1	\$20.7	\$54.4	\$289.3	\$1,132.0	\$195.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.4.2.A
BUILDING PERMITS BY
COMMERCE & INDUSTRY
DISTRICT AND PERMIT
STATUS, 2013

This table presents the status of building permits by Commerce & Industry District. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Note:
 Other represents those permits still in the pipeline.

Sources:
 San Francisco Planning Department;
 Department of Building Inspection

Number of Permits

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	10	2	433	204	42	691
Civic Center	8	2	667	294	91	1,062
Financial	12	9	2,503	942	202	3,668
Mission	14	8	1,286	630	130	2,068
North Beach	5	7	557	274	75	918
North Central	22	16	2,235	989	231	3,493
Northwest	8	7	1,355	634	114	2,118
South of Market	17	8	1,875	800	206	2,906
Southwest	53	23	5,463	2,435	384	8,358
Van Ness	9	13	930	355	86	1,393
Unclassified	2	0	13	14	298	327
TOTAL	160	95	17,317	7,571	1,859	27,002

Percentage Distribution by C&I District

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	6.3	2.1	2.5	2.7	2.3	2.6
Civic Center	5.0	2.1	3.9	3.9	4.9	3.9
Financial	7.5	9.5	14.5	12.4	10.9	13.6
Mission	8.8	8.4	7.4	8.3	7.0	7.7
North Beach	3.1	7.4	3.2	3.6	4.0	3.4
North Central	13.8	16.8	12.9	13.1	12.4	12.9
Northwest	5.0	7.4	7.8	8.4	6.1	7.8
South of Market	10.6	8.4	10.8	10.6	11.1	10.8
Southwest	33.1	24.2	31.5	32.2	20.7	31.0
Van Ness	5.6	13.7	5.4	4.7	4.6	5.2
Unclassified	1.3	0.0	0.1	0.2	16.0	1.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	1.4	0.3	62.7	29.5	6.1	100.0
Civic Center	0.8	0.2	62.8	27.7	8.6	100.0
Financial	0.3	0.2	68.2	25.7	5.5	100.0
Mission	0.7	0.4	62.2	30.5	6.3	100.0
North Beach	0.5	0.8	60.7	29.8	8.2	100.0
North Central	0.6	0.5	64.0	28.3	6.6	100.0
Northwest	0.4	0.3	64.0	29.9	5.4	100.0
South of Market	0.6	0.3	64.5	27.5	7.1	100.0
Southwest	0.6	0.3	65.4	29.1	4.6	100.0
Van Ness	0.6	0.9	66.8	25.5	6.2	100.0
Unclassified	0.6	0.0	4.0	4.3	91.1	100.0
TOTAL	0.6	0.4	64.1	28.0	6.9	100.0

Table 6.4.2.B

TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2013

This table presents the construction cost of building permits by Commerce & Industry District and by permit status. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Total Construction Costs (2013 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$8,028	\$0	\$13,510	\$74,238	\$180,748	\$276,523
Civic Center	\$274	\$47	\$41,266	\$208,936	\$410,572	\$661,094
Financial	\$1,690	\$485	\$320,929	\$820,395	\$1,265,997	\$2,409,496
Mission	\$842	\$66	\$34,410	\$78,177	\$171,253	\$284,748
North Beach	\$194	\$109	\$22,695	\$36,339	\$64,623	\$123,960
North Central	\$5,901	\$397	\$65,100	\$91,489	\$342,845	\$505,732
Northwest	\$2,038	\$123	\$33,657	\$38,436	\$104,315	\$178,569
South of Market	\$1,555	\$418	\$253,738	\$571,630	\$2,004,594	\$2,831,934
Southwest	\$5,007	\$193	\$125,784	\$210,650	\$468,914	\$810,548
Van Ness	\$253	\$132	\$30,433	\$27,099	\$353,488	\$411,405
Unclassified	\$0	\$0	\$611	\$32,744	\$1,996,386	\$2,029,742
TOTAL	\$25,782	\$1,969	\$942,132	\$2,190,132	\$7,363,734	\$10,523,750

Note:
Other represents those permits still in the pipeline.

Sources:
San Francisco Planning Department;
Department of Building Inspection

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	31.1	0.0	1.4	3.4	2.5	2.6
Civic Center	1.1	2.4	4.4	9.5	5.6	6.3
Financial	6.6	24.6	34.1	37.5	17.2	22.9
Mission	3.3	3.4	3.7	3.6	2.3	2.7
North Beach	0.8	5.5	2.4	1.7	0.9	1.2
North Central	22.9	20.2	6.9	4.2	4.7	4.8
Northwest	7.9	6.2	3.6	1.8	1.4	1.7
South of Market	6.0	21.2	26.9	26.1	27.2	26.9
Southwest	19.4	9.8	13.4	9.6	6.4	7.7
Van Ness	1.0	6.7	3.2	1.2	4.8	3.9
Unclassified	0.0	0.0	0.1	1.5	27.1	19.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2.9	0.0	4.9	26.8	65.4	100.0
Civic Center	0.0	0.0	6.2	31.6	62.1	100.0
Financial	0.1	0.0	13.3	34.0	52.5	100.0
Mission	0.3	0.0	12.1	27.5	60.1	100.0
North Beach	0.2	0.1	18.3	29.3	52.1	100.0
North Central	1.2	0.1	12.9	18.1	67.8	100.0
Northwest	1.1	0.1	18.8	21.5	58.4	100.0
South of Market	0.1	0.0	9.0	20.2	70.8	100.0
Southwest	0.6	0.0	15.5	26.0	57.9	100.0
Van Ness	0.1	0.0	7.4	6.6	85.9	100.0
Unclassified	0.0	0.0	0.0	1.6	98.4	100.0
TOTAL	0.2	0.0	9.0	20.8	70.0	100.0

Table 6.4.2.C
AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2013

This table presents the average construction cost for all permit applications by both Commerce & Industry District and permit status. It represents the total costs (Table 6.4.1.B) divided by the total permits (Table 6.4.1.A).

Average Construction Costs (2013 \$ 000s)

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$802.8	\$0.1	\$31.2	\$363.9	\$4,303.5	\$400.2
Civic Center	\$34.2	\$23.5	\$61.9	\$710.7	\$4,511.8	\$622.5
Financial	\$140.8	\$53.9	\$128.2	\$870.9	\$6,267.3	\$656.9
Mission	\$60.1	\$8.3	\$26.8	\$124.1	\$1,317.3	\$137.7
North Beach	\$38.9	\$15.6	\$40.7	\$132.6	\$861.6	\$135.0
North Central	\$268.2	\$24.8	\$29.1	\$92.5	\$1,484.2	\$144.8
Northwest	\$254.8	\$17.5	\$24.8	\$60.6	\$915.0	\$84.3
South of Market	\$91.5	\$52.3	\$135.3	\$714.5	\$9,731.0	\$974.5
Southwest	\$94.5	\$8.4	\$23.0	\$86.5	\$1,221.1	\$97.0
Van Ness	\$28.1	\$10.2	\$32.7	\$76.3	\$4,110.3	\$295.3
Unclassified	--	--	\$47.0	\$2,338.9	\$6,699.3	\$6,207.2
TOTAL	\$161.1	\$20.7	\$54.4	\$289.3	\$3,961.1	\$389.7

Note: Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

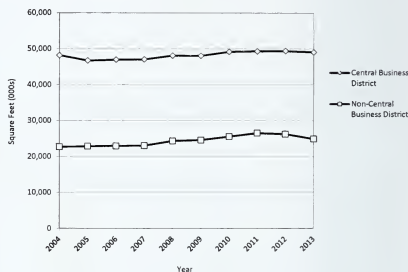
Table & Figure 6.5
TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 2004-2013

This table presents the total existing office space in the central and non-central business districts over the last ten years. It also conveys the percent change by year. This information is presented graphically in Figure 6.5.

Note:

- Office Space includes large commercial buildings of 25,000 rentable square feet or larger in the Central and Non-Central Business Districts, which are defined below. Not included are government, medical, and owner occupied buildings.
- The Central Business District includes the Financial District areas both north and south of Market Street.
- The Non-Central Business District includes Jackson Square, North Waterfront, Yerba Buena, South of Market, West of Kearny, West of Van Ness Corridor, Van Ness, and Union Square.

Sources: Cushman & Wakefield of California Research Services; San Francisco Planning Department



Building Square Footage (000s)

Location	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Central Business District	48,198	46,719	46,956	47,026	48,084	48,039	49,158	49,310	49,368	49,048
Non-Central Business District	22,686	22,845	22,932	22,996	24,300	24,569	25,539	26,488	26,205	24,871
TOTAL	70,884	69,564	69,888	70,022	72,384	72,608	74,697	75,798	75,573	73,919

Percentage Change

Location	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Central Business District	-3.1	0.5	0.1	2.3	-0.1	2.3	0.3	0.1	-0.6
Non-Central Business District	0.7	0.4	0.3	5.7	1.1	3.9	3.7	-1.1	-5.1
TOTAL	-1.9	0.5	0.2	3.4	0.3	2.9	1.5	-0.3	-2.2



Planning Department Plan Areas

MAP 6.2

Table 6.6
LAND USE SQUARE FOOTAGE BY PLAN AREA, 2012

This table conveys the area square footage for each land use category for the 20 plan areas in San Francisco. These plan areas are shown in Map 6.2.

Land Square Footage (000s)

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	361.3	192.2	132	263.5	63.1	2,904.9	0.0	76.6	2,532.2	1,363.43	0.0	7,790.3
Bayview	18,186.1	1,387.1	1,242.5	1,692.2	12,637.6	8,053.9	10.0	5,651.5	11,884.1	8,669.0	478.7	69,942.8
C-3	198.6	516.4	2,947.6	1,141.8	263.3	196.2	1,197.9	1,976.5	306.6	297.0	30.6	9,072.6
Central Waterfront	471.0	414.5	353.8	247.8	8,601.3	59.1	2.0	1,077.9	2,894.8	2,763.8	2.4	16,888.5
East Soma	1,476.8	1,436.5	1,352.3	370.1	1,049.6	230.2	61.4	924.2	733.7	1,309.3	64.1	9,008.1
Geary	12,513.4	1,035.8	183.5	916.8	130.4	2,798.5	76.8	982.5	832.8	413.7	112.7	19,836.9
Hunters Point Shipyard	0.0	0.0	0.0	0.0	18,141.6	975.8	0.0	0.0	0.0	2,618.9	0.0	21,736.3
Market/Octavia	5,109.7	1,086.4	676.2	736.8	425.1	989.5	78.3	444.5	573.2	814.3	10.2	10,944.3
Mid-Market	310.8	82.9	657.5	227.6	167.0	67.1	142.3	252.0	0.0	423.2	0.0	2,330.4
Mission	12,061.5	2,134.3	618.3	1,493.0	2,751.8	2,041.0	71.5	1,829.7	637.6	955.5	138.0	24,892.2
Mission Bay	3,440.4	343.8	151.6	197.9	426.3	793.1	0.0	254.1	268.0	5,482.9	164.7	11,522.9
Presidio	51.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	65,583.8	69.8	0.0	65,704.8
Rest of the City	350,402.5	15,682.5	4,704.5	7,353.2	6,548.3	51,374.8	2,147.1	7,829.3	201,122.0	19,510.3	2,909.4	669,583.9
Rincon Hill	272.9	375.7	280.1	49.8	29.0	187.5	0.0	56.4	7.0	373.9	0.0	1,632.3
Showplace Sq/Potrero Hill	7,990.4	848.9	682.4	613.4	2,041.8	1,782.5	0.0	1,814.8	683.1	3,374.3	53.0	19,884.5
Transbay	76.6	21.7	510.4	125.9	37.5	16.1	18.6	138.0	0.0	822.5	0.0	1,767.3
Van Ness	744.7	538.1	178.4	354.4	292.6	234.7	236.6	351.0	0.0	79.2	0.0	3,005.7
Visitation Valley	8,452.9	148.5	281.3	106.6	957.2	372.1	0.0	32.9	625.7	768.7	104.3	11,850.3
West Soma	1,002.9	652.0	657.3	875.0	2,334.6	686.9	83.3	1,100.9	10.2	1,304.5	0.0	8,887.5
Yerba Buena	106.0	153.0	173.1	162.7	25.9	229.9	223.3	640.2	330.0	52.7	0.0	2,056.8
TOTAL	423,229.7	27,050.3	15,664.2	16,888.4	56,974.1	73,933.7	4,394.3	25,413.0	289,024.9	51,485.6	4,068.1	988,081.2

CONTINUED >

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2011 (CONTINUED)

Percentage Distribution by Planning Area

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	4.6	2.5	0.2	3.4	0.8	37.3	0.0	1.0	32.5	17.8	0.0	100.0
Bayview	26.0	2.0	1.8	2.4	18.1	11.5	0.0	8.1	17.0	12.4	0.7	100.0
C-3	2.2	5.7	32.5	12.6	2.9	2.2	13.2	21.8	3.4	3.3	0.3	100.0
Central Waterfront	2.8	2.5	2.1	1.5	50.9	0.3	0.0	6.4	17.1	16.4	0.0	100.0
East Soma	16.4	15.9	15.0	4.1	11.7	2.6	0.7	10.3	8.1	14.5	0.7	100.0
Geary	62.8	5.2	0.9	4.6	0.7	13.8	0.4	4.8	4.2	2.1	0.6	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	83.5	4.5	0.0	0.0	0.0	12.0	0.0	100.0
Market/Octavia	46.7	9.9	6.2	6.7	3.9	9.0	0.7	4.1	5.2	7.4	0.1	100.0
Mid-Market	13.3	3.6	28.2	9.8	7.2	2.9	6.1	10.8	0.0	18.2	0.0	100.0
Mission	48.8	8.6	2.5	5.9	11.1	8.3	0.3	7.4	2.6	3.9	0.6	100.0
Mission Bay	29.9	3.0	1.3	1.7	3.7	6.9	0.0	2.2	2.3	47.6	1.4	100.0
Presidio	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	99.8	0.1	0.0	100.0
Rest of the City	52.3	2.3	0.7	1.1	1.0	7.7	0.3	1.2	30.0	2.9	0.4	100.0
Rincon Hill	16.7	23.0	17.2	3.1	1.8	11.5	0.0	3.5	0.4	22.9	0.0	100.0
Showplace Sq/Potrero Hill	40.2	4.3	3.4	3.1	10.3	9.0	0.0	9.1	3.4	17.0	0.3	100.0
Transbay	4.3	1.2	28.9	7.1	2.1	0.9	1.1	7.8	0.0	46.5	0.0	100.0
Van Ness	24.8	17.9	5.9	11.8	9.7	7.8	7.9	11.7	0.0	2.6	0.0	100.0
Visitation Valley	71.3	1.3	2.4	0.9	8.1	3.1	0.0	0.3	5.3	6.5	0.9	100.0
West Soma	11.5	7.5	7.6	10.1	26.9	7.7	1.0	12.7	0.1	15.0	0.0	100.0
Yerba Buena	5.1	7.3	8.3	7.8	1.2	11.0	10.7	30.5	15.7	2.5	0.0	100.0
TOTAL	42.8	2.7	1.6	1.7	5.8	7.5	0.4	2.6	29.3	5.2	0.4	100.0

Percentage Distribution by Land Use Category

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	0.1	0.7	0.1	1.6	0.1	3.9	0.0	0.3	0.9	2.7	0.0	0.8
Bayview	4.3	5.1	7.9	10.0	22.3	10.9	0.2	22.2	4.1	16.8	11.8	7.1
C-3	0.0	1.9	18.8	6.8	0.5	0.3	27.5	7.8	0.1	0.6	0.8	0.9
Central Waterfront	0.1	1.5	2.3	1.5	15.1	0.1	0.0	4.2	1.0	5.4	0.1	1.7
East Soma	0.3	5.3	8.6	2.2	1.8	0.3	1.4	3.6	0.3	2.5	1.6	0.9
Geary	3.0	3.8	1.2	5.4	0.2	3.7	1.8	3.8	0.3	0.8	2.8	2.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	31.8	1.3	0.0	0.0	0.0	5.1	0.0	2.2
Market/Octavia	1.2	4.0	4.3	4.4	0.7	1.3	1.8	1.7	0.2	1.6	0.3	1.1
Mid-Market	0.1	0.3	4.2	1.3	0.3	0.1	3.3	1.0	0.0	0.8	0.0	0.2
Mission	2.8	7.9	3.9	8.6	4.8	2.8	1.6	7.2	0.2	1.9	3.4	2.5
Mission Bay	0.8	1.3	1.0	1.2	0.7	1.1	0.0	1.0	0.1	10.6	4.0	1.2
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.7	0.1	0.0	6.6
Rest of the City	82.8	58.0	30.0	43.5	11.5	69.5	49.4	30.8	69.6	37.9	71.5	67.8
Rincon Hill	0.1	1.4	1.8	0.3	0.1	0.3	0.0	0.2	0.0	0.7	0.0	0.2
Showplace Sq/Potrero Hill	1.9	3.1	4.4	3.6	3.6	2.4	0.0	7.1	0.2	6.6	1.3	2.0
Transbay	0.0	0.1	3.3	0.7	0.1	0.0	0.4	0.5	0.0	1.6	0.0	0.2
Van Ness	0.2	2.0	1.1	2.1	0.5	0.3	5.4	1.4	0.0	0.2	0.0	0.3
Visitation Valley	2.0	0.5	1.8	0.6	1.7	0.5	0.0	0.1	0.2	1.5	2.6	1.2
West Soma	0.2	2.4	4.2	5.2	4.1	0.9	1.9	4.3	0.0	2.5	0.1	0.9
Yerba Buena	0.0	0.6	1.1	1.0	0.0	0.3	5.1	2.5	0.1	0.1	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes: Mixed Res = Mixed Residential; PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Public/OS = Public and Open Space.

Sources: San Francisco Office of the Assessor-Recorder; San Francisco Planning Department; Dun & Bradstreet



7.0 Transportation

The primary purpose of this chapter on transportation is to systematically track and publish information on transportation trends in San Francisco. While there are a number of ways of measuring trends in urban mobility in this city, for consistency, this chapter presents much of the same type of transportation data collected as part of the *Downtown Plan Monitoring Report*. The *Downtown Plan Monitoring Report* is an assessment of the effectiveness of the *Downtown Plan*, prepared every five years as mandated in Chapter 10E of the San Francisco Administrative Code. This chapter tracks changes in transportation trends and provides recent data in the following areas:

- Mode split;
- Parking entitlements;
- Vehicle occupancy;
- Transit service; and
- Transit Impact Development Fee (TIDF) revenues.

The transportation data presented in this chapter come from a number of government agency sources, primarily the Planning Department and Municipal Transportation Agency (SFMTA), but also the American Community Survey, a service of the U.S. Census Bureau. For the purposes of this chapter, data are reported on an annual or biennial basis, either as part of a larger series of thematic reports or as a stand-alone set of data specifically compiled for this inventory report.

7.1 MODE SPLIT

Daily commuters access San Francisco through a number of different transportation modes, including single occupant vehicle (or drive alone); carpool or vanpool; public transit; walking; bicycle; and other modes (e.g., motorcycles, taxicabs). In addition, an increasing number of commuters regularly work at home at least one day a week.

Local trends in commute mode share over the past six years are contained in *Table 7.1*. Data is provided for both San Francisco residents working in all locations (residents), as well as San Francisco employees either residing in San Francisco County or another county in the region (employees).

7.2 PARKING ENTITLEMENTS

Studies have shown that the volume and nature of travel is influenced by the availability and price of parking. Where parking is cheap and available, employees tend to drive to work, rather than seek other alternatives. However, where parking is more expensive and alternatives are available, commuters tend to use alternative modes some of the time.

For the purposes of this chapter, annual parking entitlements were obtained from the Planning Department database. The data are the number of off-street parking spaces approved by the Planning Commission, Zoning Administrator, and Major Environmental Review section of the Department as part of the permit approval process.

The parking entitlement data are included in *Table 7.2*. The total number of projects and corresponding parking spaces for calendar years 2009 through 2012 are listed by zoning district. Data for 2013 was not available.

7.3 VEHICLE OCCUPANCY

This indicator measures the average number of individuals per private vehicle during critical periods of the day, when traffic congestion is at its highest (e.g., peak commute periods). The primary source for local vehicle occupancy rates is the American Community Survey (ACS) undertaken by the U.S. Bureau of the Census.

This survey estimated the number of individuals commuting to work and their principal modes of travel: drive alone, carpool, public transit, bicycle, walk and other. In order to compute the average vehicle occupancy, the ACS takes the number of commuters arriving by private vehicle (drive alone or carpool/vanpool) and divides by the number of private vehicles.

The data is presented in *Table 7.3*.

7.4 TRANSIT RIDERSHIP

Levels of transit service are commonly expressed in terms of transit ridership along a specific line or in specific service areas. In this case, MUNI, the transit operating division of the SFMTA, provides periodic ridership volumes for all of its lines. These data, covering average daily volumes during Fiscal Years 2009 (2008-09) and 2013 (2012-13), are reported in *Table 7.4*. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including trolley and motor-coach bus service as well as light rail service.

7.5 TIDF REVENUES

The SFMTA Finance Division assembles data on the volume of revenue collected from the Transit Impact Development Fee (TIDF). These fees, which are collected from building applicants just prior to the issuance of a certificate of occupancy, are subsequently deposited into an account for use by the SFMTA. Historically, data have indicated wide variations in the volume of revenues collected each year, depending on the number and size of projects approved.

The TIDF has been in effect in San Francisco since 1981, although litigation prevented collection of this fee until three years later. Originally, the TIDF was developed to offset the increased marginal operating and capital costs incurred by MUNI in the late 1970s, during the boom in office development. In response to increasing transit demand, this new fee was designed to provide expanded peak period transit service to downtown MUNI routes. While the application of this fee was originally limited to all new and converted office space in downtown San Francisco, in 2004, legislation expanded its application to most non-residential uses throughout the city.

Annual revenues from the TIDF are shown in *Table 7.5*. They have been inflation adjusted to 2013 dollars.

Table 7.1 MODE SPLIT FOR COMMUTERS, 2008-2013

Table 7.1 presents the most recent mode split data for San Francisco's residents and employees. It is shown in terms of the percentages of all trips.

Mode	Residents						Employees					
	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
Drive Alone	38.4	38.9	36.0	37.6	36.3	36.4	36.5	36.6	35.3	37.1	35.0	35.3
Carpool/Vanpool	8.4	7.4	7.9	7.3	7.7	6.8	11.1	11.0	10.5	9.5	9.7	10.5
Transit	31.9	31.8	34.1	31.6	33.1	32.7	36.4	35.6	37.5	36.0	38.3	37.5
Walk	9.4	10.3	9.4	9.9	9.8	10.9	6.7	7.6	7.1	7.0	7.1	7.1
Bicycle	2.7	3.0	3.5	3.4	3.8	3.8	2.0	2.2	2.6	2.5	2.7	2.6
Work at Home	7.5	6.8	6.7	7.8	6.7	6.8	5.3	4.8	5.0	5.6	4.9	5.0
Other	1.7	1.8	2.4	2.3	2.6	2.6	2.0	2.2	1.9	2.3	2.2	1.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: US Census, American Community Surveys.

Table 7.2

**PARKING ENTITLEMENTS
BY PLANNING
COMMISSION, ZONING
ADMINISTRATOR OR
MAJOR ENVIRONMENTAL
ANALYSIS, 2009-2013**

Table 7.2 presents the most recent data on parking projects and spaces entitled by either the Planning Commission, Zoning Administrator, or the Department's Major Environmental Analysis section. Data for 2013 is not available.

Zoning District	2009		2010		2011		2012		2013 ^a	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2	0	0	1	-25	1	-1	1	4	n/a	n/a
C-3-G	2	-80	0	225	1	113	0	0	n/a	n/a
C-3-O	1	15	0	0	1	129	0	0	n/a	n/a
C-3-O(SD)	0	0	1	10	0	0	1	0	n/a	n/a
C-3-R	0	0	0	0	1	40	0	0	n/a	n/a
C-3-S	0	0	0	0	0	0	0	0	n/a	n/a
CRNC	0	0	0	0	0	0	1	-1	n/a	n/a
C-M	1	156	0	0	0	0	0	0	n/a	n/a
M-1	1	421	0	0	0	0	1	168	n/a	n/a
PDR-1-D	0	0	0	0	0	0	1	7	n/a	n/a
PDR-2	0	0	0	0	1	20	0	0	n/a	n/a
NC-1	0	0	0	0	0	0	1	0	n/a	n/a
NC-2	0	0	0	0	0	0	0	0	n/a	n/a
NC-3	1	126	1	0	1	0	1	-8	n/a	n/a
HAIGHT	0	0	1	0	0	0	0	0	n/a	n/a
24th St-Mission	1	9	0	0	0	0	0	0	n/a	n/a
INNER SUNSET	0	0	0	0	0	0	0	0	n/a	n/a
PACIFIC	0	0	0	0	0	0	0	0	n/a	n/a
POLK	1	32	2	31	0	0	1	10	n/a	n/a
UPR MARKET NCD	0	0	0	0	0	0	1	26	n/a	n/a
NCT-2	0	0	0	0	0	0	1	0	n/a	n/a
NCT-3	2	63	2	39	0	0	0	0	n/a	n/a
UPR MARKET NCT	0	0	0	0	0	0	1	44	n/a	n/a
Valencia St NCT	0	0	0	0	1	22	0	0	n/a	n/a
Mission St NCT	0	0	0	0	1	0	0	0	n/a	n/a
HAYES NCT	0	0	1	4	1	-32	1	7	n/a	n/a
HAYES NCT/ROTO	0	0	0	0	0	0	1	126	n/a	n/a
Ocean Avenue NCT	1	175	0	0	0	0	0	0	n/a	n/a
Ocean Avenue NCT/P	0	0	1	-16	0	0	0	0	n/a	n/a
RC-3	0	0	1	38	0	0	0	0	n/a	n/a
RC-4	3	-4,495	1	670	0	0	1	520	n/a	n/a
RED	1	6	0	0	0	0	0	0	n/a	n/a
RED/SLR	0	0	0	0	0	0	0	0	n/a	n/a
RH DTR	1	2	0	0	1	358	1	19	n/a	n/a
RH-1	1	25	3	78	1	0	2	-1	n/a	n/a
RH-2	0	0	0	0	5	5	1	1	n/a	n/a
RH-3	0	0	1	1	3	7	0	0	n/a	n/a
RM-1	1	20	1	3	1	43	1	-1	n/a	n/a
RM-1/RM-4	0	0	0	0	1	6,975	0	0	n/a	n/a
RM-2	0	0	0	0	2	3	0	0	n/a	n/a
RM-3	0	0	0	0	1	2	0	0	n/a	n/a
RM-4	0	0	0	0	0	0	0	0	n/a	n/a
RSD	1	7	0	0	0	0	0	0	n/a	n/a
RTO	0	0	3	107	2	30	1	0	n/a	n/a
RTO-Mission	0	0	1	-1	0	0	1	0	n/a	n/a
SLI	1	-53	1	14	0	0	0	0	n/a	n/a
SLR	1	18	1	0	0	0	0	0	n/a	n/a
SPD	0	0	0	0	0	0	1	2	n/a	n/a
UMU	0	0	3	-87	4	594	1	8	n/a	n/a
MUG	0	0	0	0	0	0	0	0	n/a	n/a
MUO	1	18	0	0	0	0	0	0	n/a	n/a
MUR	1	11	2	204	0	0	1	24	n/a	n/a
WMUG	0	0	0	0	0	0	1	358	n/a	n/a
P	0	0	0	0	0	0	1	241	n/a	n/a
TOTAL	23	-3,524	28	1,295	30	8,308	26	1,554	n/a	n/a

Note:

- * "C" refers to commercial districts
- * "DTR" refers to downtown residential districts
- * "M" refers to PDR districts
- * "MU" and "UMU" refers to mixed use districts
- * "NC" and named areas refer to neighborhood commercial districts
- * "P" refers to the public district
- * "R" refers to residential districts
- * "S" refers to support activity districts

Source: San Francisco Planning Department

Table 7.3

PRIVATE VEHICLE OCCUPANCY IN San Francisco, 2006-2013

Table 7.3 presents data on private vehicle occupancy rates in San Francisco. It describes the average number of people per trip in San Francisco.

Population	2006	2008	2009	2010	2011	2012	2013
San Francisco Residents	1.11	1.14	1.16	1.15	1.13	1.14	1.14

Sources: US Census American Community Survey

Table 7.4

**TRANSIT
RIDERSHIP ON
MUNI LINES,
2009 & 2013**

Table 7.4 presents data on average daily ridership on MUNI lines for 2009 and 2013.

Daily Ridership by Route

Route Nos.	Route Name	2009	2013	Difference	% Change
1, 1AX, 1BX	California	27,426	29,127	1,701	6.2%
2	Clement	7,661	5,217	-2,445	-31.9%
3	Jackson	3,474	3,443	-30	-0.9%
5	Fulton	12,960	17,269	4,309	33.2%
6	Parnassus	8,232	8,462	230	2.8%
9, 9L, 8X, 8AX, 8BX	San Bruno	44,909	57,687	12,778	28.5%
10	Townsend	4,143	5,518	1,375	33.2%
12	Folsom	7,744	4,244	-3,500	-45.2%
14, 14L, 14X	Mission	43,208	40,225	-2,983	-6.9%
16AX, 16BX	Noriega Express	2,060	1,513	-547	-26.5%
17	Parkmerced	989	866	-123	-12.4%
18	46th Avenue	3,966	3,653	-313	-7.9%
19	Polk	10,954	7,574	-3,380	-30.9%
21	Hayes	14,455	12,426	-2,029	-14.0%
22	Fillmore	17,173	16,818	-355	-2.1%
23	Monterey	5,420	4,971	-449	-8.3%
24	Divisadero	10,798	11,374	576	5.3%
27	Bryant	8,401	7,927	-473	-5.6%
28, 28L	19th Avenue	15,037	15,765	729	4.8%
29	Sunset	18,731	18,795	64	0.3%
30, 30X	Stockton	32,111	35,364	3,253	10.1%
31, 31AX, 31BX	Balboa	11,505	9,954	-1,551	-13.5%
33	Stanyan	6,303	6,233	-70	-1.1%
35	Eureka	826	892	66	8.0%
36	Teresita	1,133	1,529	395	34.9%
37	Corbett	1,767	2,109	342	19.3%
38, 38L, 38AX, 38BX	Geary	55,909	57,514	1,604	2.9%
39	Coit	937	929	-8	-0.9%
41	Union	2,920	3,699	779	26.7%
43	Masonic	16,166	11,971	-4,195	-25.9%
44	O'Shaughnessy	15,290	16,897	1,607	10.5%
45	Union-Stockton	13,717	11,735	-1,982	-14.4%
47	Van Ness	13,444	13,050	-394	-2.9%

Source:
San Francisco Municipal
Transportation Agency

CONTINUED >

TABLE 7.4
TRANSIT RIDERSHIP ON
MUNI LINES, 2009 & 2013
(CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2009	2013	Difference	% Change
48	Quintara-24th Street	12,915	10,591	-2,324	-18.0%
49	Van Ness-Mission	27,557	26,765	-792	-2.9%
52	Excelsior	2,177	2,029	-148	-6.8%
54	Felton	7,993	6,801	-1,193	-14.9%
56	Rutland	460	300	-161	-34.9%
66	Quintara	622	626	4	0.6%
67	Bernal Heights	3,799	1,726	-2,072	-54.6%
71, 71L	Haight-Noriega	12,760	13,135	375	2.9%
80X	Gateway Express	78	17	-62	-78.8%
81X	Caltrain Express	265	198	-66	-25.0%
82X	Levi Plaza Express	303	1,029	726	239.8%
88	BART Shuttle	898	464	-435	-48.4%
90	Owl	213	202	-11	-5.3%
91	Owl	630	605	-25	-4.0%
108	Treasure Island	2,533	4,215	1,681	66.4%
F	Market	17,527	23,208	5,681	32.4%
J	Church	13,096	14,767	1,671	12.8%
K/T	Ingleside/Third	28,103	33,752	5,649	20.1%
L	Taraval	29,270	28,816	-454	-1.6%
M	Ocean View	27,373	26,920	-453	-1.7%
N	Judah	45,576	41,439	-4,138	-9.1%
New Routes					
83X	Mid-Market Express	na	228	na	na
NX	Judah Express	na	1,416	na	na
Discontinued Routes					
4	Sutter	1,768	na	na	na
7	Haight	1,751	na	na	na
26	Valencia	3,013	na	na	na
53	Southern Heights	1,290	na	na	na
89	Laguna Honda	124	na	na	na
TOTAL		681,865	683,999	2,134	0.3%

Table 7.5
TRANSIT IMPACT
DEVELOPMENT FEE
(TIDF) REVENUE
COLLECTED (INFLATION-
ADJUSTED), FISCAL
YEARS 2004-2013

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2004 (July 1, 2003 - June 30, 2004) in 2013 dollars.

Fiscal Year	Fee Structure	Collections (2013 \$)
2003-2004	1981 Ordinance	\$1,693,159
2004-2005	2004 Ordinance	\$1,149,932
2005-2006	2004 Ordinance	\$1,401,221
2006-2007	2004 Ordinance	\$2,312,250
2007-2008	2007 Ordinance	\$1,006,091
2008-2009	2007 Ordinance	\$5,013,157
2009-2010	2007 Ordinance	\$2,029,591
2010-2011	2010 Ordinance	\$1,131,508
2011-2012	2010 Ordinance	\$1,776,648
2012-2013	2010 Ordinance	\$4,720,312

Source: San Francisco Municipal Transportation Agency

Acknowledgements

Mayor

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John Avalos

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Outside Agencies

With assistance from:

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U.S. Census Bureau

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California State Board of Equalization

Cushman & Wakefield

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San Francisco Controller's Office

San Francisco Department of Building Inspection

